




1/22/2011

EXHIBIT 5
DATE 1/24/11
HB Commerce



**JOINT APPROPRIATIONS
SUB-COMMITTEE ON
GENERAL GOVERNMENT**

Presented by
Anna Marie Moe, Acting Division Administrator
Montana Promotion Division
January 24, 2011



MONTANA Promotion Division, Department of Commerce • January 2011

**MONTANA PROMOTION DIVISION
MISSION STATEMENT...**


Our mission is to strengthen Montana's economy through the promotion of the state as a vacation destination and film location.

By maximizing the combined talents and abilities of its staff and with guidance from the Governor's Tourism Advisory Council, the Montana Promotion Division strives to promote a quality experience to visitors while encouraging preservation of Montana's environment and quality of life.

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2009 TOURISM INDUSTRY FACTS

- 10 Million Non-Resident Visitors
- \$2.3 Billion in Non-Resident Expenditures



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WHERE DID THE \$2.3 BILLION GET SPENT?

- 32% Gas/Oil _____ \$710.7 million
- 22% Restaurant/Bar _____ \$498.4 million
- 16% Retail Sales _____ \$358.1 million
- 13% Lodging _____ \$279.7 million
- 8% Groceries _____ \$191.9 million
- 3% Auto Rental/Repairs _____ \$ 81.4 million
- 2% Outfitters/Guides _____ \$ 41.0 million
- 2% Licenses, Entrance Fees _____ \$ 37.0 million
- 3% Other _____ \$ 73.7 million

• (Includes Miscellaneous Services, Transportation Fees, and Gambling)

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VISITOR EXPENDITURES CREATE JOBS

- Tourism supports 25,480 Montana jobs
- These jobs generate \$661 million in personal income
- Visitor spending generated \$153 million in state & local taxes



THE EFFECT RIPPLES THROUGH YOUR COMMUNITY

- Each Montana household saves \$379 in taxes annually
- The tourism industry spends money on legal and professional services, utilities, insurance, entertainment, food and beverage, automotive and much more.

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REASONS FOR TOURISM SUCCESS

- Statutory Appropriation
 - The Montana Promotion Division is primarily funded by the statutorily appropriated lodging facility use tax. Montana Promotion Division responsibilities are mandated primarily in Title 15, Chapter 65, and Title 2, Chapter 15, MCA.
 - Stable funding source allows for long term strategic planning and execution to market Montana effectively as a tourism destination and a film location

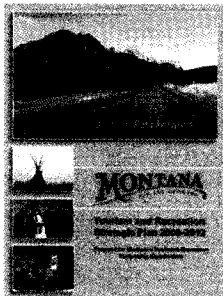
Total Projected 7% Lodging Tax Revenue FY11		\$10,718,000
Disbursements of Revenue		
2% Lodging Facility Sales Tax Revenue - 1900N TO GENERAL FUND		\$12,882,000
4% Lodging Facility Use Tax Revenue		\$17,880,000
Montana Heritage Commission		(\$400,000)
COPIES TO THE MCA		
Department of Revenue		(\$132,410)
Other State & Local Governmental Expenses (Other State & Local Government)		
Available for Distribution (including anticipated interest on bonds)		\$17,385,590
State Parks - 6.6%		
Operating & Maintenance		\$1,128,000
University System - 2.5%		\$434,000
Public & Regional Revenue		\$174,000
Historical Society - 1%		\$174,000
Historical Sites & Sites		
Regional/CVIA Marketing - 25.6%		\$3,896,000
Department of Commerce Programs - 47.5%		\$11,714,000*
Montana Promotion Division (includes 67% of total promotion costs)		

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REASONS FOR TOURISM SUCCESS

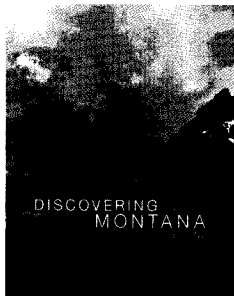
▪ Strategic Plan

- Over 1,200 individuals involved in the tourism industry have contributed to the Five Year Strategic Plan for Tourism and Recreation.



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REASONS FOR TOURISM SUCCESS



▪ Brand

- The Montana Brand has proved to be an effective tool in marketing to our target audience of the Geo-Traveler as well as working with tourism partners to have a cohesive message in promoting Montana.

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RECENT FILM OFFICE HIGHLIGHTS INCLUDE:

▪ Last American Cowboy

- Montana's first National television series began on June 7th. It is on the Animal Planet Channel



▪ America: The Story of Us

- 12 part series on the History Channel incorporated aerial footage shot by the MFO and MTOT



▪ Expedition Wild

- New show on National Geographic Wild Channel features Casey Anderson of Bozeman.

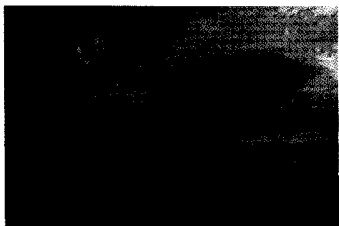


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MONTANA PROMOTION DIVISION

■ Photography/Publicity

FY 2010 over \$30 million in publicity value



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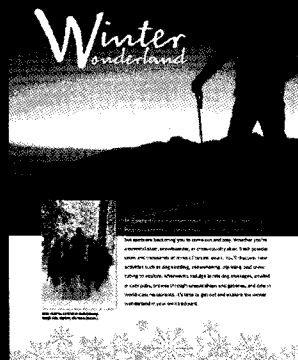
ENDLESS FEAST

(PBS show that filmed in September 2009 and aired on May 17, 2010)




National
Geographic
Traveler

SPECIAL
SECTION

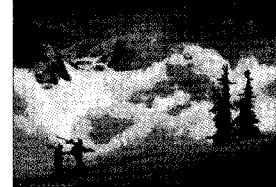


MTOT OPENING SPREAD – Full Page Advertorial and Ad

Magnificent



ESCAPE THE NOISE AND CROWDS
AND ENJOY THE BEAUTY OF MONTANA




Montana is a state of contrasts. It's a place where you can find the most rugged and beautiful scenery in the country, and where you can also find the most peaceful and serene landscapes. Montana is a state of endless possibilities, and it's a place where you can find everything you need to escape the noise and crowds of the world.

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MONTANA CO-OPS – Advertorial and Ad

Bountiful
Big Sky Resort



Escape to Yellowstone Country




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MONTANA CO-OPS
– Advertorial and Ad

Snow-bound
in Bridger Bowl



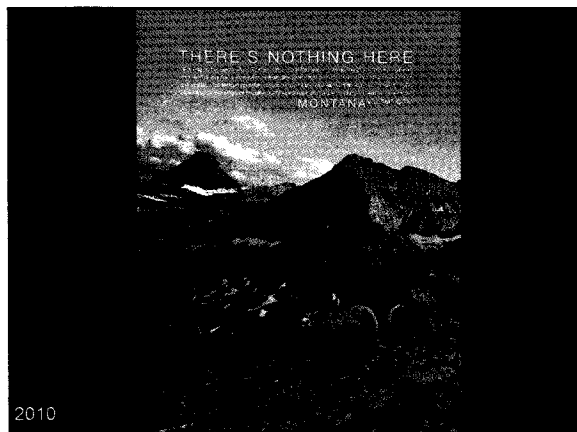
Whimsical
West Yellowstone



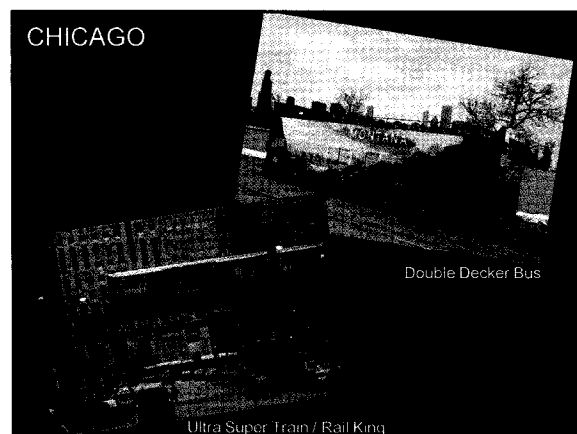
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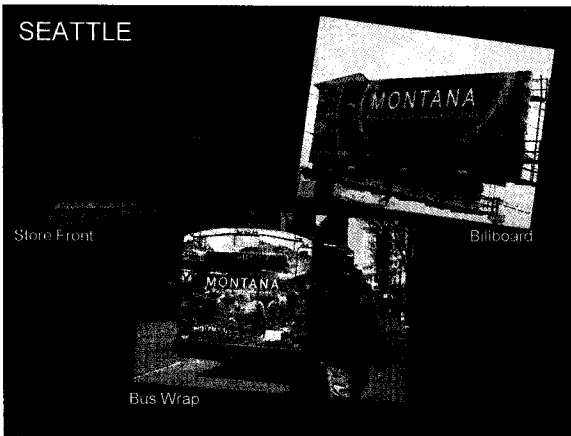
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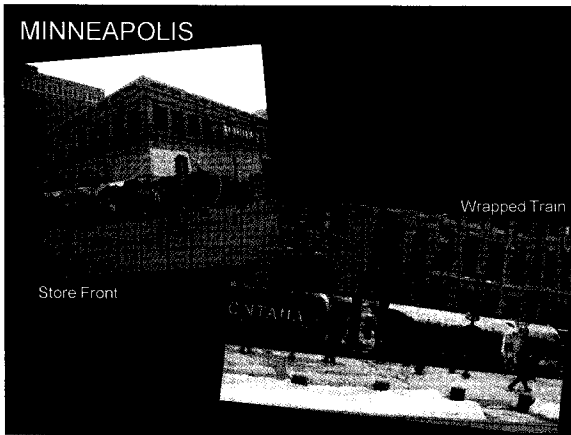
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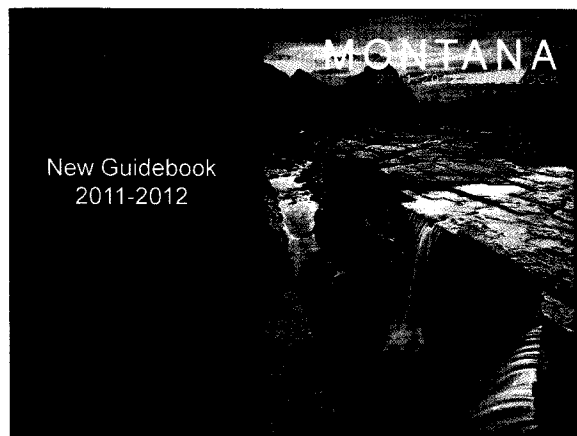
**TOURISM MEANS A PROVEN
"RETURN ON INVESTMENT"**

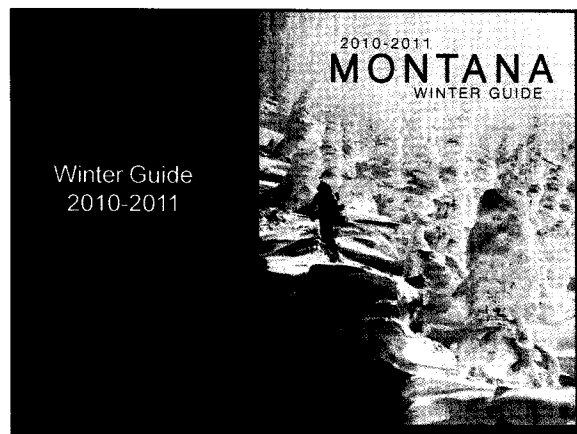
- Every \$1 spent on advertising placements yields \$104 in visitor spending in Montana
 - For every \$1 spent by the Division that is \$31 returned in new money to the state
- In the 2010 Brand Awareness Study, it was found that once Montana advertised in a market, top of mind awareness of Montana rose 37%. Of those who had seen the advertising, they were 3 times more likely to plan travel to Montana than those who had not seen the advertising

MONTANA

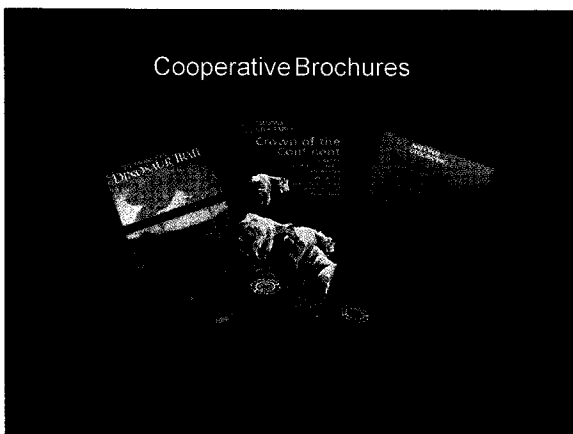
Promotion Division, Department of Commerce • January 2011







Cooperative Brochures



MONTANA PROMOTION DIVISION

■ Tourism Infrastructure Investment Program (TIIP)

These grants assist with the construction, improvement or expansion of non-profit owned/operated tourism facilities and attractions across the state.

1995-Present...

- 82 Tourism related projects in 45 Montana communities
- Total Bed Tax Investment: \$3.644 million
- Total Project Costs: \$42.883 million
- Leverage of \$11:\$1



MONTANA Promotion Division, Department of Commerce • January 2011

MONTANA PROMOTION DIVISION

■ HB 2 Decision Package

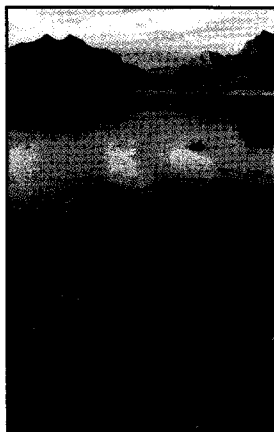
PL-5208 - MPD PRIVATE FUNDS & AUDIT ADJUSTMENTS HB 2 -

The Montana Promotion Division has historically adjusted its HB 2 private funds appropriation to \$750,000 for each year of the biennium. This proposal continues the historically established trend.

REVERSE GLOBAL 5% REDUCTION ADMENDMENT

Reinstate the \$162,748 in private fund authority for each year of the biennium for a total of \$325,496.

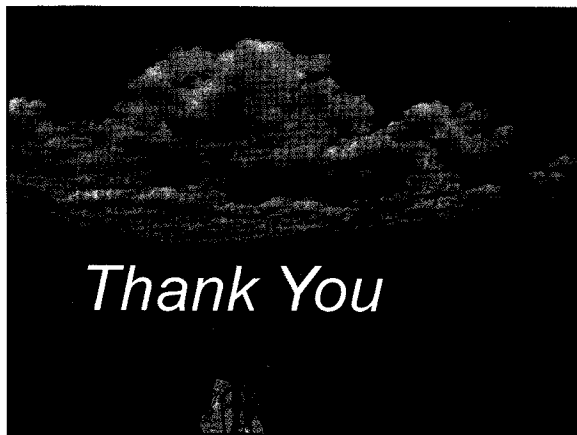
MONTANA Promotion Division, Department of Commerce • January 2011



USEFUL RESOURCES

Montana Office of Tourism
(406) 841-2870
www.travelmontana.mt.gov

(ITRR) Institute for
Tourism & Recreation Research
(406) 243-5686
www.itrr.umt.edu



MONTANA DEPARTMENT OF COMMERCE

MONTANA

OFFICE OF TOURISM

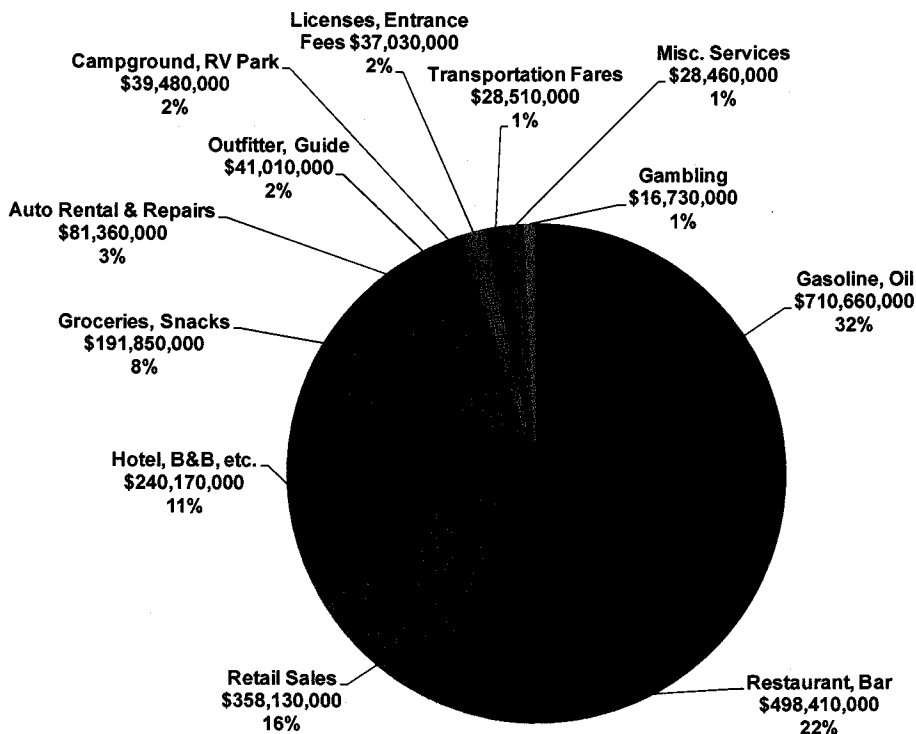
MONTANA'S TOURISM & RECREATION INDUSTRY FAST FACTS

Tourism is Important Business

- Tourism is one of Montana's leading industries.
- 10 million visitors traveled to Montana in 2009 which means 10 new customers per Montana resident for Main Street businesses.
- These visitors spent \$2.3 billion in 2009 which is new money for Montana's economy.

2009 Visitor Expenditures

(\$2 BILLION IN NEW MONEY)



Tourism is Big Business

- Visitor spending generated \$153 million in state and local tax revenue in 2009.
- Without tourism tax revenue, it is estimated that each Montana household (avg. 2.5 ppl) would have to pay \$392 in additional local and state taxes. (total tax revenue / total households)

Tourism is Our Business

- Tourism and recreation businesses **support 25,500 Montana jobs.**
- Visitor spending **provided \$569 million in worker salaries.**
- Some of our **Partners** in the **Tourism Industry** include:
 - Hotels, motels, bed & breakfasts and dude ranches
 - Restaurants and bars
 - Outfitters and guides
 - Ski resorts and private travel attractions
 - Museums and cultural facilities
 - Private and public campgrounds
 - Farmers and ranchers
 - Gas station and convenience store owners
 - Transportation companies
 - Retail shops
 - State and federal agencies
- **Montana's 2008-2012 Tourism & Recreation Strategic Plan** incorporates input received from Montana citizens, businesses and organization representatives (including private, public, tribal, nonprofit), totaling over **1,200+ Montanans.**

Tourism is a Competitive Business

- Montana needs to gain market share in tourism marketing and advertising.
- Montana's travel promotion budget is **30% lower** than the national state average.
- Every bed tax dollar invested in promoting Montana yielded **\$3.50 in state and local taxes.** Out of this \$3.50, **\$2.12 is returned** directly to the **state's general fund.**
- In a 2010 Brand Awareness Study, it was found that once Montana advertised in a market, top of mind awareness of Montana as a travel destination **rose 37%.** Of those who had seen the advertising, they were **3 times more likely to plan travel** to Montana than those that had not seen the advertising.
- Additional funding to enhance tourism marketing efforts would result in increased visitor spending which in turn increases income, property and corporate tax collections.

Figures compiled using data included in ITRR's 2009 *Montana Nonresident Economic Impacts & Expenditures*; *Montana Tourism & Recreation Strategic Plan 2008-2012*; U.S. Travel Association's 2009-10 *Survey of U.S. State and Territory Tourism Office Budgets*; *Montana Census and Economic Information Center* and Susan Ockert, Economist, Montana Department of Commerce; and Leisure Trends Group *MTOT Brand Awareness Study 2010.*

Updated January 2011

<http://travelmontana.mt.gov>



MONTANA'S TOURISM FUNDING

In 1987, Montana's legislature recognized the vast importance of tourism to Montana's future economy. During that session, the legislature created a 4% Lodging Facility Use Tax, commonly referred to today as the "bed tax." Lodging facilities (such as hotels, motels, bed & breakfast inns, guest ranches, resorts and campgrounds) collect this tax from guests. In turn, these funds are directed to the various entities shown below. Importantly, no additional money for tourism funding comes from Montana's general fund. In 2003, an additional 3% Lodging Facilities Sales Tax was added to the existing 4% and is deposited directly into the state general fund. In FY10, the general fund received \$12,330,846 through this additional 3% sales tax.

Total Projected 7% Lodging Tax Revenue FY11	\$30,738,000*
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Disbursements of Revenue

3% Lodging Facility Sales Tax Revenue* (100% TO GENERAL FUND)	\$12,852,000
4% Lodging Facilities Use Tax Revenue	\$17,886,000
Montana Heritage Commission <i>(Virginia City/Nevada City)</i>	(\$400,000)
Department of Revenue <i>(Collection costs & reimbursement to general fund of tax paid by state employees)</i>	(\$132,416)
Available for Distribution <i>(According to percentages established in statute)</i>	\$17,353,584

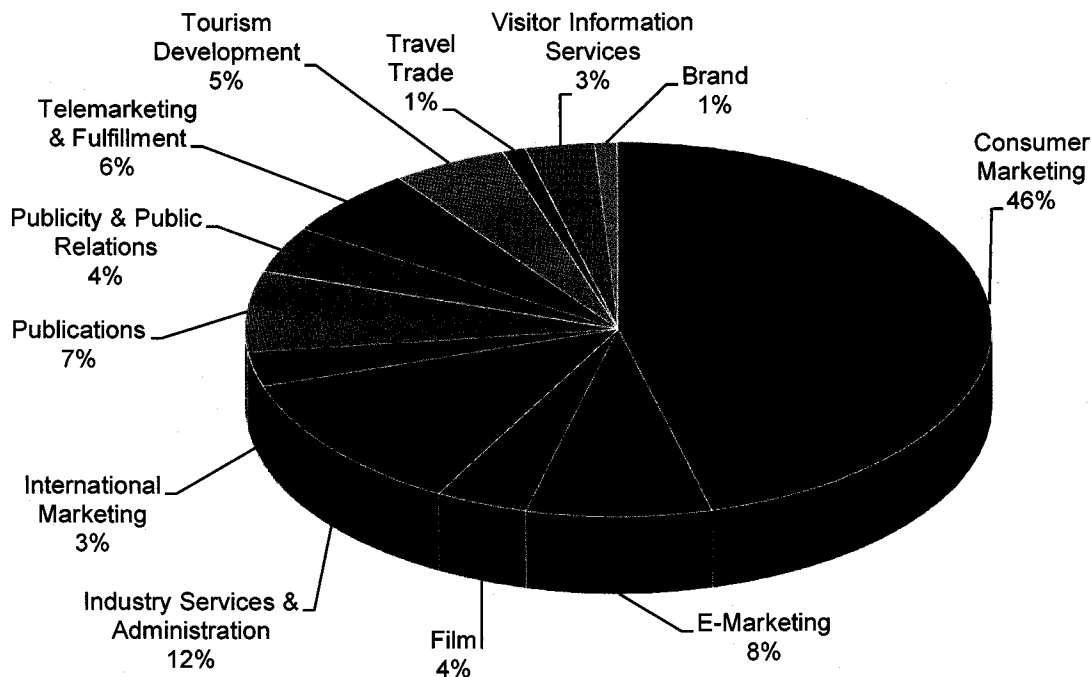
State Parks - 6.5% <i>(Operations & Maintenance)</i>	\$1,128,000
University System - 2.5% <i>(Tourism & Recreation Research)</i>	\$434,000
Historical Society - 1% <i>(Historical Sites & Signage)</i>	\$174,000
Regions/CVBs Marketing - 22.5%	\$3,905,000
Department of Commerce Programs - 67.5% Montana Promotion Division (Montana Office of Tourism/Film Office)	\$11,714,000*

Department of Commerce—Montana Promotion Division FY11

Funds from Accommodations Tax	\$11,714,000
Income from Ad Sales, Co-ops, etc. & HB2	\$750,000
Montana Historical Society <i>(Administrative Appropriation)</i>	(\$482,669)
Projected Total Funds Available	\$11,981,331

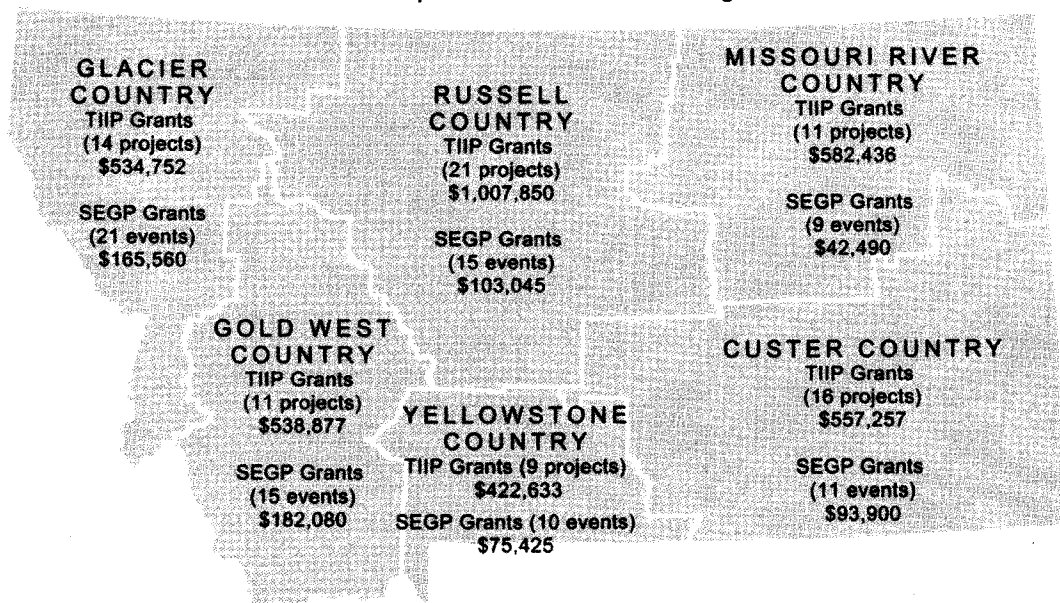
*Based on LFD Revenue Estimates as of 11/19/10

Distribution of Montana Promotion Division Funds FY11



Montana Promotion Division—Tourism Development Grant Awards

TIIP: Tourism Infrastructure Improvement Program
SEGP: Special Event Grant Program



Statewide Tourism "Bed Tax" Grants
TIIP (1995-2010)—\$3.64 million
SEGP (2003-2011)—\$622,500

The \$3.64 million in TIIP funds (1995-2010) helped create \$42.88 million in tourism facility improvements, an 11 to 1 match.

(Updated January 2011)

EXHIBIT NO. 5

DATE 1.24.11

BILL NO. Commerce

2010 PRODUCTIONS

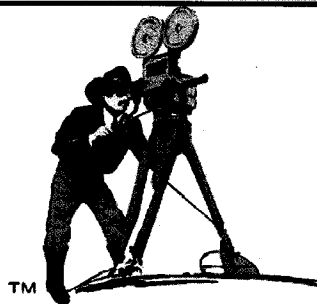
2010 Totals

Commercials	16
Documentaries	7
Independent Features	2
Industrial/Corporate	11
Multimedia/Web	1
Music Videos	1
Short Films	1
Still Shoots	3
Television	26

Total Productions 68

Estimated
Revenue..... 4.5 million

Assists 5

On Location in
MONTANA

Montana Film Office

Dept. of Commerce
301 S. Park Ave.
Helena, MT 59620-0533
406/841-2876
406/841-2877 (fax)
montanafilm@mt.gov
www.montanafilm.com

PRODUCTION

PRODUCTION CO.

LOCATION

MONTH

Commercials

3M Automotive DRTV*	Production West	Billings	Sep
Anti-Monkey Butt Powder	Grizzly Creek Films	Condon area; Swan Lake	Sep
Death With Dignity PSAs	Hopcraft Communications	Missoula; Helena	Jan
Dow Great Stuff	Washington Square Films	Great Falls	Aug
Enzymatic Therapy DRTV	Production West	Billings	Jul
Forever Young DVD	Looking Glass Films	Hamilton	Dec
Game Saver*	Stafford Multimedia	Bozeman area—Kirk Wildlife Refuge	Jul
Goodwill	Out in the Cold Prod/Wendt Advertising	Billings	Sep
Ice Road Truckers promo*	The Arsenal/History Channel	Red Lodge area—Beartooth Highway	Mar
Montana Food Bank Network PSA	Backtrack Films	Missoula	Oct
Montana Tobacco Use Prevention	Three Dog Films	Helena	Jun
Polaris	Streetlight Films, USA	Craig area	Jun
Stockman Banks	Out in the Cold Prod/Wendt Advertising	Statewide	Aug
Toyota*	Ranch Exit Films	Bozeman	Dec
U.S. Marine Corps*	Bandito Brothers	Livingston; Emigrant area	Jul
Wind Energy spec commercial	JTP Fifth	Cut Bank; Ethridge	Sep

Documentaries

Business of Tourism	U.S. Department of State	Bozeman; Deer Lodge; Glacier National Park; Kalispell; Whitefish	Apr
Forgotten Flag Raisers	Out in the Front Productions LLC	Missoula; Evaro; Pablo; Flathead Indian Reservation	Oct
The Great Wheel of Life	Gaeljin Productions/TG4 Network	Bozeman; Butte	Jun
Indian Relay	Montana PBS	Fort Belknap Reservation	May-Dec
Koani and Her Unusual Pack*	Tree & Sky Media Arts	Hamilton; Missoula; Bitterroot Valley	Apr-Jun
Smoke in the Wilderness	Montana PBS	Bob Marshall Wilderness	Jun-Dec
The True Story	Blink Films/Smithsonian Channel	Bozeman; Choteau area	Jun

Independent Features

Moonhair*	Moonhair Films LLC	Augusta area; Blackfeet Reservation	Sep
My Favorite Movie (re-shoots)	Dream Team Cinema	Roberts	Dec

Industrial/Corporate

Amgen	Out in the Cold Prod/Barrington Media	Billings	Oct
Anheuser Busch	Out in the Cold Productions	Billings; Butte	Jul
ConocoPhillips	Out in the Cold Productions	Billings	Nov; Dec
Floating Island International	Out in the Cold Prod/Kinetic Marketing	Billings	Sep
John Deere	Out in the Cold Productions	Billings	Aug
Karen Voight Fitness DVDs	Poindexters	Bozeman area	Jul
Navistar	Out in the Cold Prod/Freeman Pictures	Billings	Sep
REC Silane training video*	Video Express Inc.	Butte; Helena	Mar
Revenue Cycle Partners	Out in the Cold Prod/Activated Marketing	Billings	Apr
SC 2010 demonstration video	Spotlight Films/Trebo Manufacturing	Billings	Oct
Whole Foods	Out in the Cold Prod/Spotlight Prod	Miles City	Oct

* Certified Production—The Big Sky on the Big Screen Act

—continued on reverse—

Multimedia/Web

Game Saver*Stafford MultimediaBozeman area—Kirk Wildlife Refuge Jul

Music Video

Rodney StreetDucks In A Row Helena Jul

Short Films

Hanging the SheriffMeg McWhinneyBannack; Virginia City Apr

Still Shoots

British GQBritish GQ magazine Phillipsburg area May

Naturalizer Shoes Tandem Productions Glacier National Park May

Teva fall campaign Teva Footwear Whitefish; Glacier National Park Oct

Television

The American RancherSpotlight Productions/RFD-TV Big Timber area—Springdale Jan

America's Most Wanted Out in the Cold Prod/Spotlight Prod Glasgow Mar
20th Century Fox

America's Most Wanted (cover shots)Spotlight Prod/STF Productions Hardin Jun

Antiques Roadshow* WGBH/PBS Billings Jun

Chimpanzee Preserve Out in the Cold Prod/Spotlight Prod Red Lodge Mar
Inside Edition

The Cook House with Mike & MattStafford Films/ESPN Bozeman & Three Forks areas Jul

Ghost Lab Everyday Paranormal/Discovery Channel Deer Lodge Jul

History Detectives Lion Television Billings Jul

How the States Got their Shapes Half Yard Prod/History Channel Bozeman area; Dillon area Dec

I Shouldn't Be Alive Darlow Smithson Prod/Animal Planet Bozeman Sep

In What State are the United States Free Run Pictures/Voyage Channel Butte; Crow Agency; Dillon; Livingston; Missoula Jun

Larry King Live Out in the Cold Prod/CNN Red Lodge Mar

The Legend Hunters 51 Minds Entertainment/VH1 Condon area; Swan Lake Sep

Man V. Food Sharp Entertainment/Travel Channel Butte Aug

Nightline Out in the Cold Prod/Spotlight Prod Billings; Roundup Nov
ABC

On the Case with Paula Zahn Out in the Cold Prod/Discovery Channel Billings; Darby Jul

Outside the Lines Out in the Cold Prod/ESPN Helena Jun

Pit Bulls & Parolees Out in the Cold Prod/44 Blue Productions Billings Apr

Powder Horn Montana The Sportsman's Channel Various Montana locations Various

Rachel Ray Show Spotlight Prod/Out in the Cold Prod Billings area—Molt Nov

Smoke Jumpers* Leroy & Morton Prod/Current TV Missoula area Sep

Through The Wormhole with Morgan Freeman Incubator TV/Science Channel Bozeman Nov

Tom Brokaw interview West of Kin Productions Bozeman Aug

Tourette Syndrome Out in the Cold Prod/Inside Edition Missoula Jan

Wardens Muddy Boots Prod/Outdoor Channel Various Montana locations Various

The Wild Within Zero Point Zero Prod/Travel Channel Fort Peck Reservation; Missouri Breaks; Oct
Gardiner area—Yellowstone River

Assists (assistance provided to production company but project does not film in Montana)

Creating Destiny 2 JD Freeman Productions provided footage of various Montana locations Nov

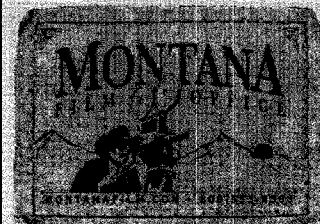
History Detectives Lion Television/PBS provided aerial footage of Helena area Mar

Infinity of Nations exhibit Smithsonian Museum of the provided b-roll footage of Montana bison May
American Indian

Meeting Online Robert Kenner Films provided historical footage of Helena Jun

Rivertop Renewables West of Kin Productions provided Montana footage and stills Oct

2010



PRODUCTIONS

PROJECTS BY TOURISM REGIONS*

Custer Country
17 Projects

Glacier Country
14 Projects

Gold West Country
16 Projects

Missouri River Country
2 Projects

Russell Country
6 Projects

Yellowstone Country
20 Projects

* some projects have
multiple filming locations

Montana State Legislature

2011 Session

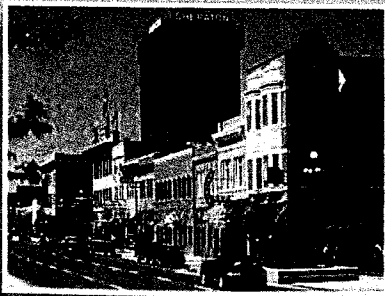
Exhibit 5

This exhibit is a booklet which can not be scanned, therefore only the front cover/table of content and 10 pages have been scanned to aid in your research.

The original exhibits are on file at the Montana Historical Society and may be viewed there.

**Montana Historical
Society Archives
225 N. Roberts
Helena MT 59620-1201
2011 Legislative Scanner Susie Hamilton**

EXHIBIT NO. 5
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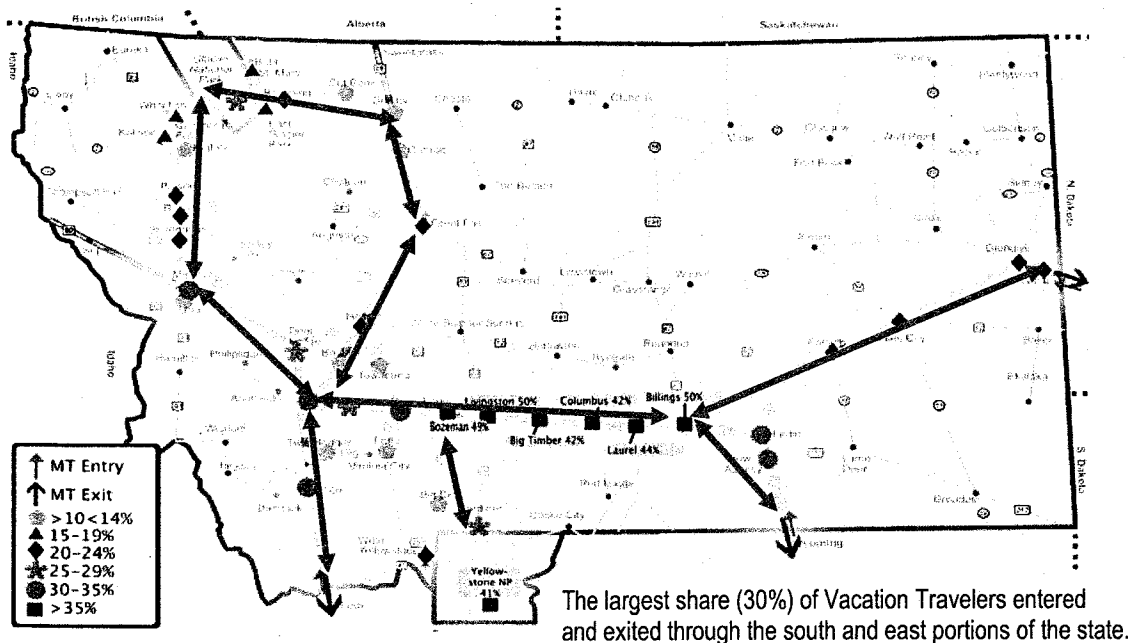


Tourism and Recreation Strategic Plan 2008-2012

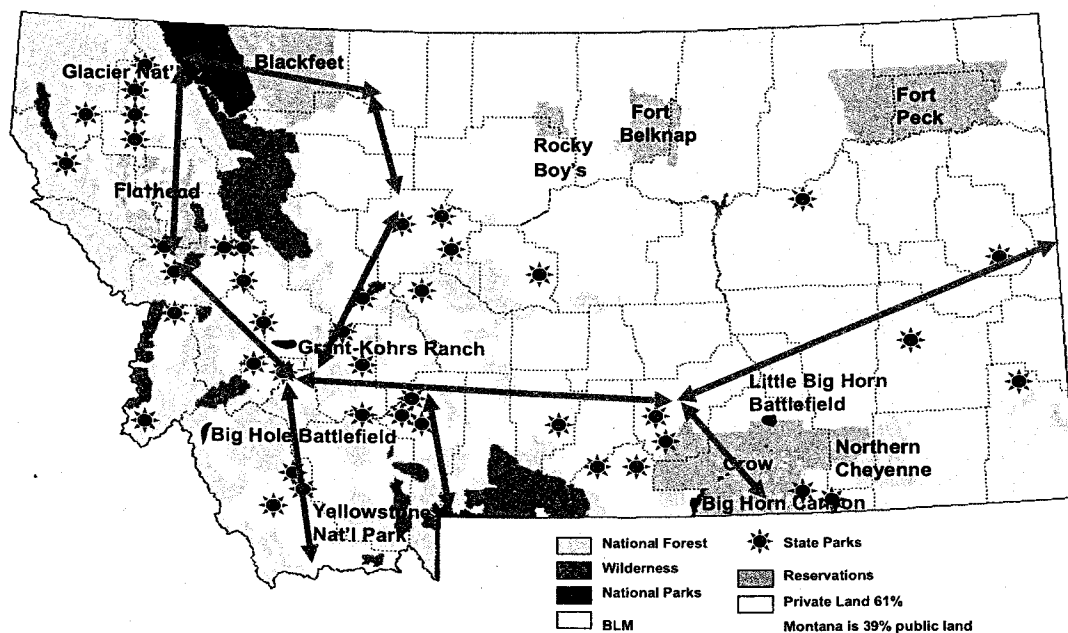
Prepared for Montana's Tourism & Recreation
Partnership Stakeholders

Main Travel Corridors of Nonresident Vacation Travelers in Montana, 2005

Source: University of Montana Institute for Tourism and Recreation Research, December 2007



Montana's Public Lands



The most popular travel corridors of nonresident Vacation Travelers in Montana traverse the interstate highways, largest population centers, and routes to and from national parks.

Montana Tourism and Recreation Strategic Plan 2008-2012

Montana creates a special connection with just about everyone who experiences her pristine waters, wide open prairies, abundant wildlife, and majestic mountains. Those of us lucky enough to call Montana home feel this sense of place – the value of the Montana experience – every day. Protecting these special qualities while expanding opportunities for Montanans to sustain and improve their quality of life is the responsibility and the obligation of all of us who are the stewards of Big Sky Country.

I want to congratulate the 1,200 Montanans who helped create the Montana Tourism and Recreation Strategic Plan 2008-2012. It is a blueprint for action – a path to follow – offering ways to add value to the Montana experience for residents and visitors, alike. The plan sets high standards for tourism and recreation development and promotion which, when achieved, will deliver great economic and social benefits across the state.

By 2012, at the end of the path laid out in the plan, Montana's 10+ million visitors will be enjoying more Montana-made and grown products, they'll be sharing more of their wealth with Montana businesses and communities of all sizes, and those of us who are the stewards of this special place will have more resources to protect and enhance the cultural, historical and natural assets that we value – the parts of Montana that create that special connection within us all.

On behalf of the people of Montana, thank you to all the stakeholders who helped create this plan. My best wishes as you move forward, individually and collectively, on the path of action laid out inside these pages.



Sincerely,

BRIAN SCHWEITZER
Governor

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- Appendix I: Montana Tribal Tourism Alliance (MTTA) and Tribal Actions
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- Appendix M: Federal Agency and MTRI Actions

*All chapters and appendices of the Montana Tourism and Recreation Strategic Plan 2008-2012 are available online at:
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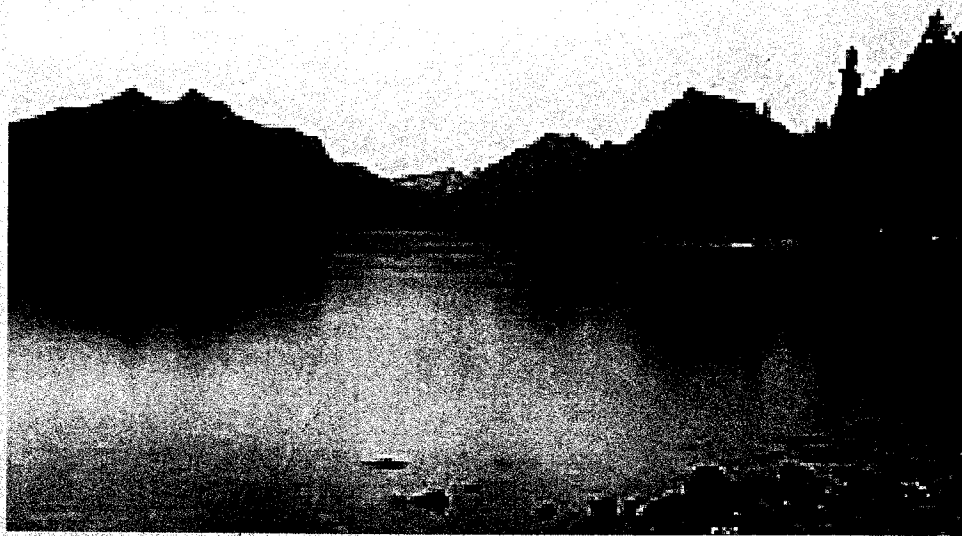
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**Executive Summary:
Montana Tourism
and Recreation
Strategic Plan
2008-2012**

Vision for Tourism and Recreation in Montana by 2012

It is the year 2012. Tourism and recreation in Montana have achieved the following:

Balance. Tourism and recreation revenues continue to increase year-round. Montana's unique character and sense of place are retained while providing quality experiences for both residents and nonresident visitors. Montana's rich natural, historic and cultural assets are managed for sustainable levels of visitation in a manner consistent with responsible, shared use. Communities that desire tourism are benefiting from new revenue and jobs, while retaining their community integrity and heritage. Montana is known for its diverse, high quality natural, historic, and cultural tourism and recreation experiences, wide open spaces, abundant wildlife, and the friendly professionalism of its people.

Cooperation. Effective public-private-nonprofit-tribal partnerships are engaged in visionary, collaborative planning and implementation efforts which foster economic growth and stability, while respecting the values of Montanans. The private sector, community development organizations, supporting public agencies, and the nonprofit sector are working as a team, tapping limited resources more effectively through collaborative efforts.

Support. Sufficient financial and technical assistance is available from various sources to support effective tourism marketing and research, management of natural, historic, and cultural assets, and business development. Tourism is integrated into Montana's education and workforce training systems. An adequate workforce is available to support the tourism and recreation industry, and there is affordable housing for the workforce. Stable funding sources that do not diminish tourism marketing funds are available to develop and maintain infrastructure for tourism and recreation needs.

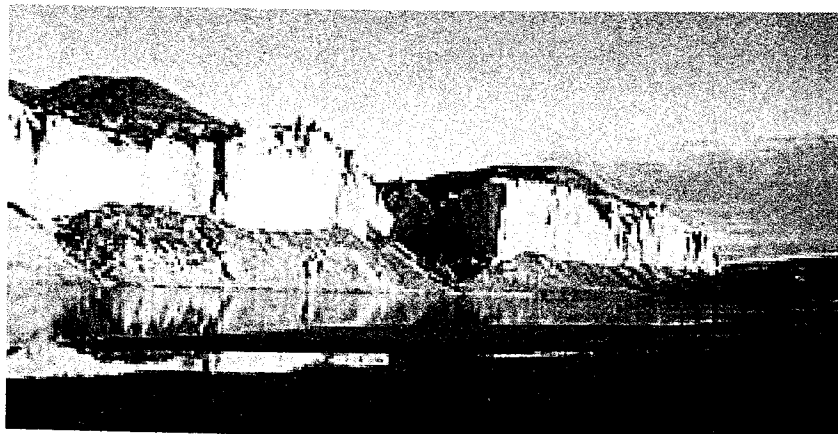
Respect. Tourism is recognized as an essential element of Montana's economy. It is appreciated by Montana citizens, elected officials, and federal/state land management agency officials for its financial and social contributions to the state. Cities have been provided tools to cover the costs of impacts from tourism. Lasting legacies from major historical and cultural events such as the Lewis & Clark Bicentennial and the National Folk Festival in Butte continue to benefit Montana residents and provide ongoing opportunities for businesses and visitors.

Accountability. A comprehensive evaluation system is being used to measure the success and impacts of tourism and recreation development and marketing, consistent with the strategic goals. Information about visitation trends, impacts, and visitor research are widely distributed to provide businesses and agencies facts needed to make good management decisions, and to be responsive to changing customer tastes and preferences.

The Montana Tourism and Recreation Strategic Plan 2008-2012
is available online at the Travel Montana intranet web site:

www.travelmontana.mt.gov/2008strategicplan/

For more information, contact Travel Montana at (406) 841-2870



Strategic Plan Purpose, Process, and Rationale

The Strategic Plan Provides a Blueprint for Action

The purpose of this Strategic Plan is to:

- ◆ Serve as a blueprint for a strategic, integrated approach to tourism and recreation development and marketing in Montana.
- ◆ Confirm priorities to focus resources.
- ◆ Balance Montana's tourism promotion efforts, products, and partnerships.
- ◆ Assign responsibilities for implementation.
- ◆ Identify funding sources to pay for actions.
- ◆ Measure results and return on investment.

Strategic Plan Addresses All Facets of Tourism and Recreation

This Strategic Plan is designed to be used by all organizations in Montana's tourism and recreation industry – private, public, tribal, and nonprofit. It is a plan that integrates tourism and recreation into Montana's economic and community development, resource management, conservation, and public policy efforts. It is a holistic view of tourism and recreation planning and implementation, addressing not only promotion, but also the product itself, and partnerships required for successful implementation.

More than 1,200 Montanans Participated in the Planning Process

The strategic planning process began in October 2006, and was completed in December 2007. The process included extensive outreach and input from tourism and recreation businesses, public agencies, tribes, arts and historical organizations, farmers and ranchers, conservation groups, motorized recreation enthusiasts, sportsmen, and other interested members of the public. Through public workshops, interviews, a statewide survey, and the Governor's Conference on Tourism, more than 1,200 Montana citizens, businesses, and organization representatives provided input.

10+ Million Visitors Spend Nearly \$3 Billion Annually in Montana

In 2006, nonresident visitors spent \$2.9 billion in Montana, and tourism generated \$21+ million in state lodging and select sales taxes. These revenues support facilities and services that improve the quality of life in Montana. Total nonresident tourism expenditures doubled from 1995 to 2005, and the industry continues to grow at a healthy pace. **However, there is still much room for improvement:** in 2006, there were 4.6 million *vacant* hotel room nights statewide, primarily in the off-peak seasons.

Tourism is the World's Largest Industry, Competition is Increasing

Despite steady growth, both the U.S. and Montana *lost* market share over the past five years among destination vacation travelers due to aggressive marketing efforts of emerging destinations. Fuel prices, the economy, and security concerns affect tourism, but specific sectors of the industry continue to see double-digit growth.

In order to remain competitive, Montana needs to capitalize on its strengths (high quality outdoor experiences, clean air and water, authenticity, tribal culture, history, arts, and affordability), and address its weaknesses (lack of coordination and communication, lack of resources for asset management and marketing, workforce gaps, and transportation infrastructure needs).



Strategic Plan Addresses "Big Picture" Questions:

- ◆ What lies ahead?
- ◆ What types of visitors will Montana serve?
- ◆ How is Montana different from its competition?
- ◆ What does success look like?
- ◆ How do Montanans protect what they value?

Strategic Plan Process Phases:

1. Information-gathering (Oct 2006-Mar 2007)
2. Refinement of strategies and actions (Feb-Apr 2007)
3. Draft Plan for public comment (May-Oct 2007)
4. Completion of final Strategic Plan (Oct-Dec 2007)

In 2006, there were 4.6 million *vacant* hotel room nights in Montana (representing \$309 million in lost potential lodging revenue, and \$21.7 million in lost tax revenue).

Montana's 2006 average daily hotel room rate (ADR) was \$68, compared to the national average ADR of \$96.



What is "Geotourism"?

Geotourism is tourism that sustains or enhances the geographic character of the place being visited, including its environment, culture, heritage, landmarks, and the well-being of its residents. Geotourism seeks to build a relationship between traveler and destination, and between guest and host. Geotourists make up 55.1 million of the 154 million American travelers, about 36%.

How Are Montana Lodging Taxes Allocated?

A 4% lodging tax in Montana supports state, regional, and local tourism efforts, as well as state parks, history, culture, trade, and community infrastructure and events. In fiscal year 2007, those funds were allocated as follows:

	Amount
Travel Montana	\$9,764,682
Regions/CVBs	3,705,415
Fish, Wildlife, Parks	1,041,564
MT Historical Society	681,803
Grants (TIIP, SEGP)	280,000
Univ. of MT - ITRR	400,602
Heritage Commission	400,000
MT Dept. of Revenue	386,646
MT Trade Program	150,000
TOTAL FY07	\$16,810,711

The Strategic Plan Emphasizes Growth in Off-Peak Seasons, and Strengthened Capacity among Tourism Organizations

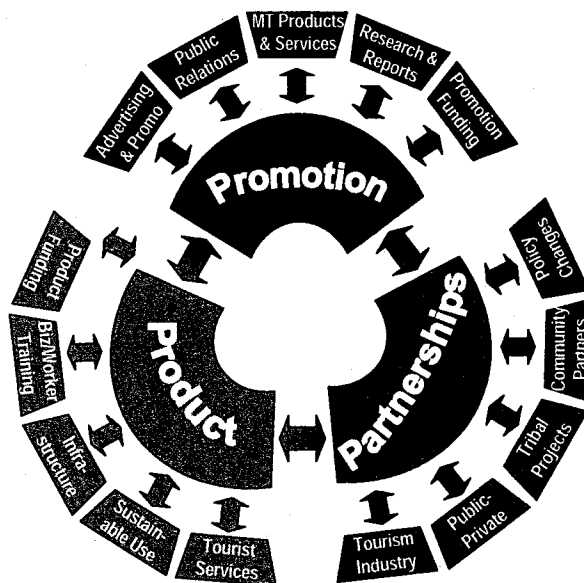
Half of Montana's visitor spending occurs in June through September. To enhance tourism sustainability, the Strategic Plan emphasizes maintaining summer performance while increasing off-peak season visitation through targeted promotions, an integrated visitor information system, and themed product development. Resources to create these results will come from increased state promotion funding, leveraging of private money, and enacting local tools like the Tourism Business Improvement District to bolster local marketing and professional development. Other key actions include public awareness of tourism benefits and impacts; sustainable management of natural, cultural and historic assets; and workforce training and housing.

Highly Effective Targeting of Niche Markets like Geotourists – Highlighting Montana's Brand – is Critical to Competitiveness

Geotourists, particularly the "Geo-savvy" segment, are primary targets for Montana. These visitors share Montanans' appreciation of the state's culture, heritage, environment, and social well-being. Other niche markets suited to Montana include wildlife and bird watchers, photographers, scenic drivers, adventure travelers, sporting events, cultural and heritage travelers, to name a few. Consistent use of Montana's tourism brand will help reach more first time visitors. Once here, Montana exceeds visitor expectations and many, 83%, become repeat visitors.

Tourism Strategic Framework and Actions

The strategic framework for the Montana Tourism and Recreation Strategic Plan consists of three main elements: Promotion, Product and Partnerships. The graphic below shows five key themes within each category. **Promotion** includes advertising, publicity, and other promotion activities targeting nonresident travelers, as well as awareness-building efforts targeting Montana residents and elected officials. **Product** refers to the natural, cultural, tribal, and historic assets of Montana that travelers wish to experience, along with the facilities and services provided by Montana's tourism and recreation businesses, tribes, and agencies. **Partnerships** are essential to implementation of the Strategic Plan, by leveraging resources, changing policies and procedures to increase effectiveness, and addressing challenges faced by the tourism and recreation industry.



Montana State Legislature

2011 Session

Exhibit 5

This exhibit is a booklet which can not be scanned, therefore only the front cover/table of content and 10 pages have been scanned to aid in your research.

The original exhibits are on file at the Montana Historical Society and may be viewed there.

**Montana Historical
Society Archives
225 N. Roberts
Helena MT 59620-1201
2011 Legislative Scanner Susie Hamilton**

EXHIBIT NO. 5
DATE 1.24.11
BILL NO. Commerce

USING THE MONTANA BRAND



WE'VE ALL HEARD

Stories of the girl from the east who wants to move to Montana and marry a rancher.

Of course, the rancher knows that behind the romantic vision of ranch life is the possibility of having to bring newborn calves into your kitchen to survive 20-below nights or the possibility of getting kicked in the head by your horse. Romance and hard work go hand in hand.

So if the first book, *Discovering the Montana Brand*, had a flair of romance about it, that's a good thing. That romance is what attracts visitors to our state. This book, *Using the Montana Brand*, is the hard work behind the romance. It's the process, strategy, target and executional considerations we'll need to make the ranch run, so to speak.

THE STORIES



BOULDER CREEK VALLEY

HOW DID WE GET



YELLOWSTONE NATIONAL PARK

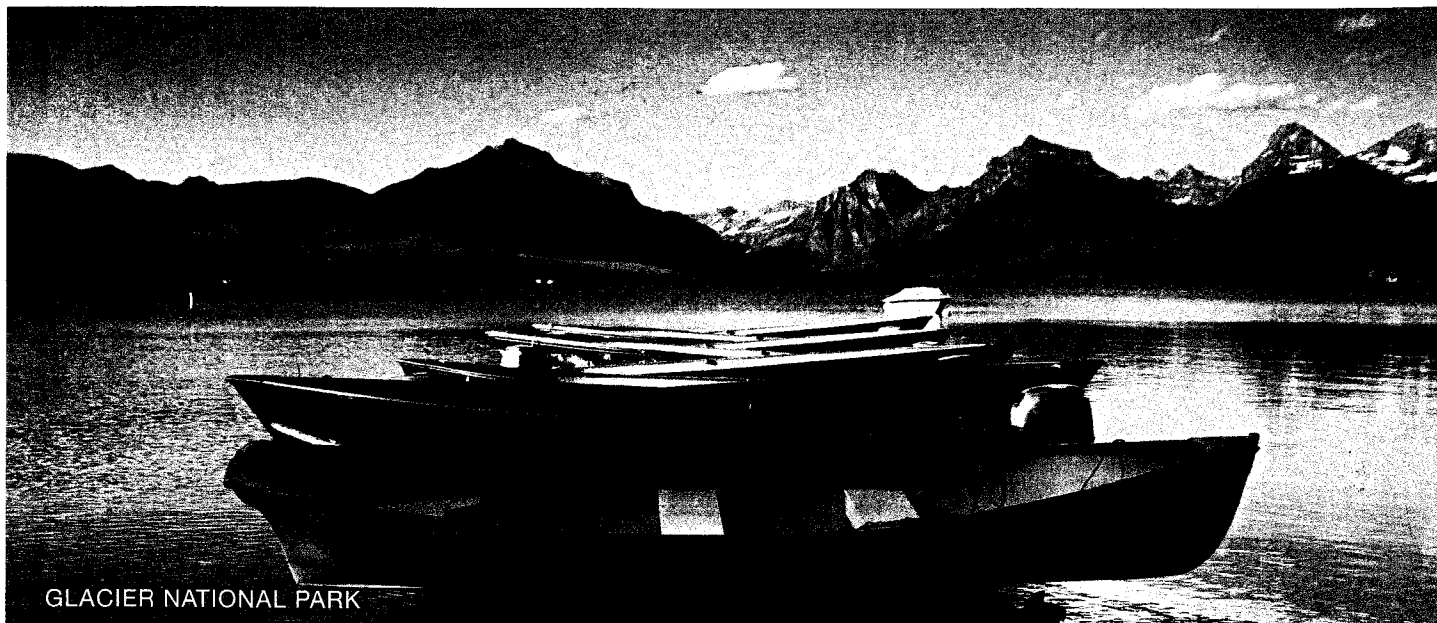
HERE?

THE MAIN PURPOSE OF THIS BRANDING PROCESS IS TO UNITE THE EFFORTS OF THE VARIOUS ENTITIES MARKETING MONTANA WITH A MORE COHESIVE VOICE.

The process of uncovering Montana's brand took nearly a year and involved the input of hundreds of Montanans, as well as past and potential first-time visitors. Upon determining a target audience that was deemed most likely to visit Montana based on our state's attributes, we:

- + Conducted focus groups that were representative of our target audience. Some participants had previously traveled to Montana, and some had not.
- + Conducted eight meetings across Montana to collect input from more than 350 resident stakeholders.
- + Matched input from both the target audience and stakeholders to determine the most relevant and credible attributes of the Montana brand.
- + Then created three brand pillars and tested them in a survey of 500 travelers screened for attitudes, demographics and behaviors consistent with our target audience.
- + Confirmed through testing that the brand pillars, when communicated the right way, would attract our target to vacation in Montana.

Though each entity marketing Montana has its own variances of execution based on regional or individual differences, the main target, brand pillars and tone of communications can and should apply to everyone. Research shows that this target finds Montana's brand attributes to be both desirable and believable.



THE MONTANA BRAND

When you're marketing Montana, you might think of our three brand pillars as a hand of cards. We don't play every card every time but played together properly, they should win the hand.

+ MORE SPECTACULAR UNSPOILED NATURE THAN ANYWHERE ELSE IN THE LOWER 48. This is our ace card—the Differentiator. Of the three, this is the one that distinguishes Montana from our competitors—particularly when we “iconify” some of our most outstanding examples such as Yellowstone, Glacier and others. When you have a hand this strong, lead with aces.

+ VIBRANT AND CHARMING SMALL TOWNS THAT SERVE AS GATEWAYS TO OUR NATURAL WONDERS. This is the card that people are surprised we have—the Mitigator. It mitigates people's perception of Montana being remote without denying it. It further shifts the focus from the destination being the town itself to the town being a gateway to our natural wonders.

+ BREATHTAKING EXPERIENCES BY DAY AND RELAXING HOSPITALITY AT NIGHT. This is the card that ties the hand together—the Brand Builder. It leverages our strengths (nature and scenery) to drive up the qualities the audience desires (comfort and exhilaration). And remember, depending on the person, exhilaration is just as easily achieved during a scenic drive as it is scaling our highest peak.

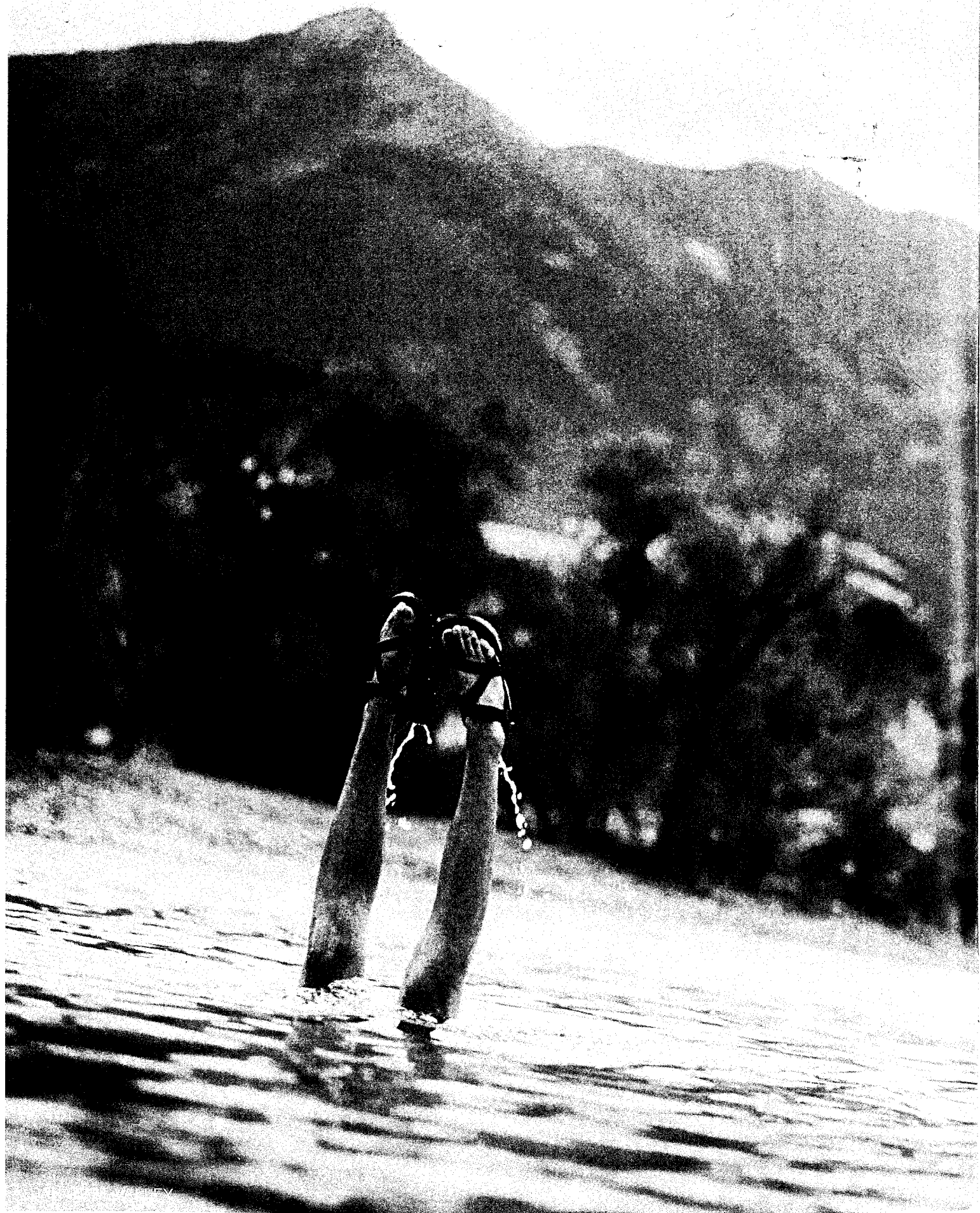
THE MONTANA TONE

To continue with the card analogy, card games are not merely about the cards you have in your hand. There is a style with which the hand is played that is often rooted in the personality of each player. Whether you think back to the poker played by the gunslingers of the Old West or the modern-day versions played in tournaments on TV, each player uses his or her certain style, or tone, to try to achieve additional advantage in winning the hand.

In branding Montana, our tone is based on the common personality of the people who live here. When we all use this tone, it further unifies our voice beyond merely the cards—or brand pillars—that we also share.

- + SIMPLE. But not unsophisticated.
- + CONFIDENT. Not arrogant.
- + GENUINE. Not old-fashioned.
- + GROUNDED. But not stuck in our ways.





WHO IS THE TARGET?

Based upon the attributes of the Montana brand, the most likely visitor to our state is an emerging segment called a geotraveler. This group numbers 55 million in the United States alone. Geotourism is defined as:

Tourism that sustains or enhances the geographic character of the place being visited including its environment, culture, heritage, landmarks and the well-being of its residents.

Still not sure what this is? Let us explain a bit more:

- + Geotravelers focus on the experience of the destination—not on checking off a list of must-see attractions. You won't see geotravelers cutting off a conversation with a local because they're late for the theme park.

- + Geotravelers seek the authenticity of people and places. This is something that every corner of Montana is steeped in. These travelers want to discover experiences that can't be found anywhere else. They want to sit in the stands at a small-town rodeo and buy fresh huckleberries from a local farmer at the farmers market. That's why they came here.

- + Geotravelers have multi-faceted interests and will take in a number of attractions during a vacation so long as they are authentic to the culture they are visiting. Their experiences often include signature moments—from hiking Logan Pass to the equally memorable museum and corner café in Glasgow. (And by the way, they loved that scenic drive, too.)

The geotravelers' choice of travel destination is affected by:

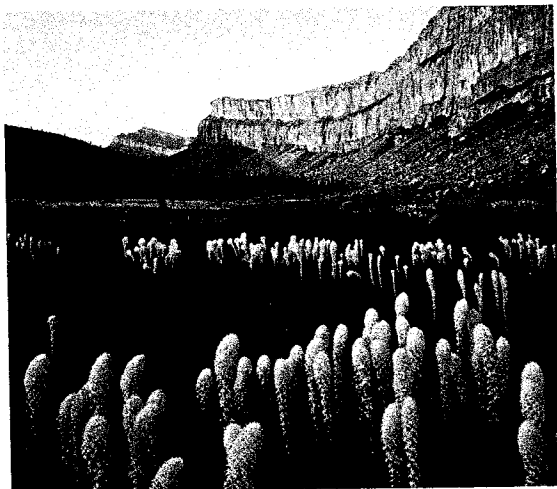
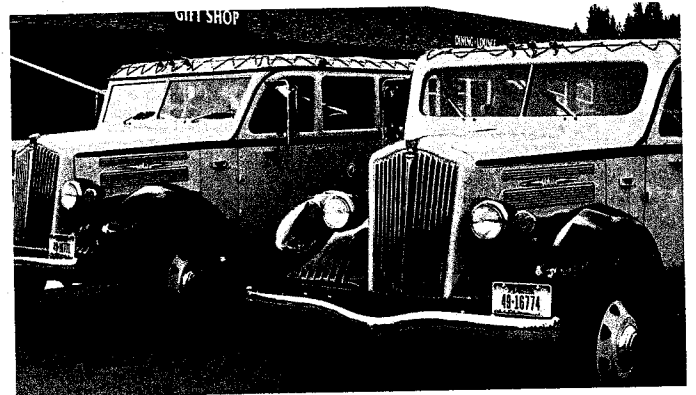
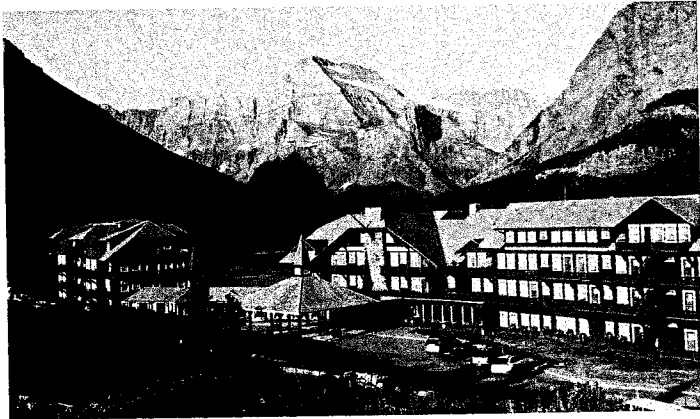
- + Their desire to customize their experiences and create their own personal connections when traveling.
- + An emphasis on making the most of every moment due to the lack of time in their day-to-day lives.
- + The pervasive nature of technology in planning their travels and exploring their destinations before they arrive.
- + An interest in immersing themselves in the culture.
- + The ability to get off the beaten path.
- + The capacity to get out of their comfort zone.
- + Their desire to live on a healthy planet.

Psychographically and demographically, geotravelers:

- + Are well educated.
- + Are environmentally aware.
- + Have a strong preference for cultural and social aspects of travel.
- + Are socially conscious.
- + Travel frequently (minimum of three trips per year).
- + Spend a disproportionate amount of their income on travel compared to other travelers.
- + Come from various age groups and income ranges.

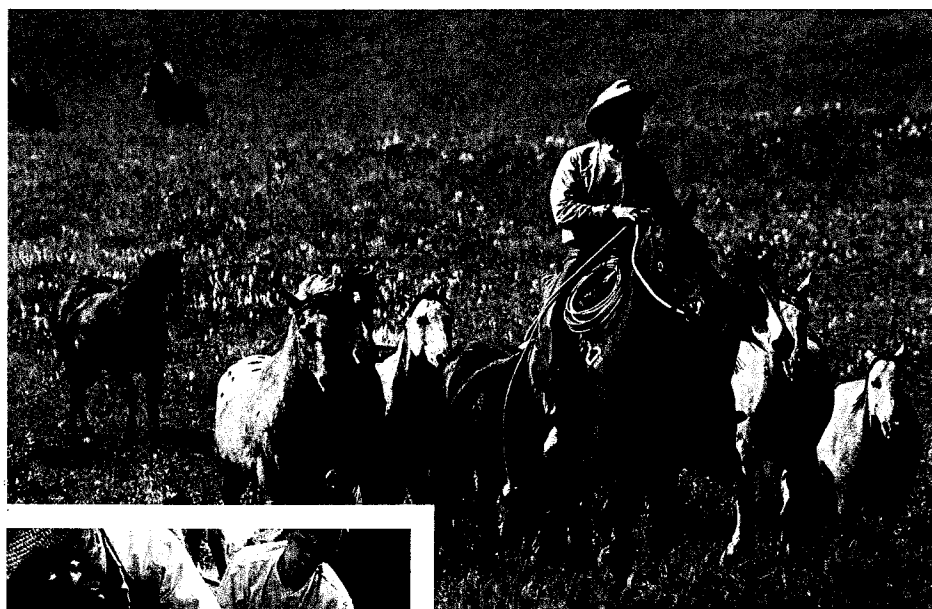
TELLING YOUR STORY

PHOTOS TO ATTRACT THE FIRST-TIME VISITOR



MONTANA WITH PHOTOS.

PHOTOS TO ATTRACT THE REPEAT VISITOR



Montana State Legislature

2011 Session

Exhibit 5

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MONTANA

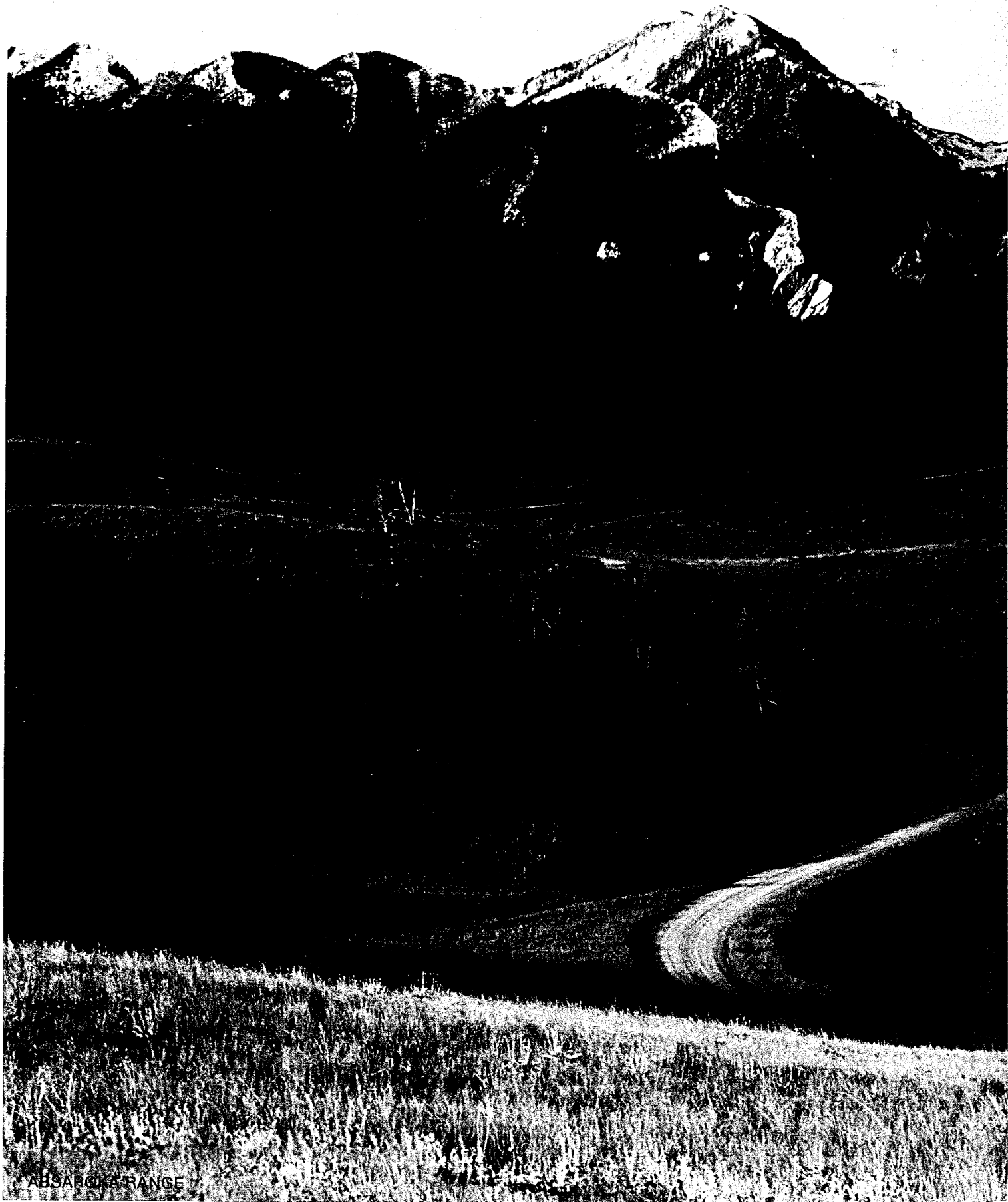
EXHIBIT NO. 5
DATE 1-24-11
BILL NO. Commerce

THANK YOU for taking on the challenge to brand Montana. The spectacular landscapes and vibrant towns that we all love are assets that are important to Montana's tourism industry. I hope you'll continue your work to unify tourism marketing efforts that are important not only to your success in the tourism industry, but the success of the entire Montana economy.

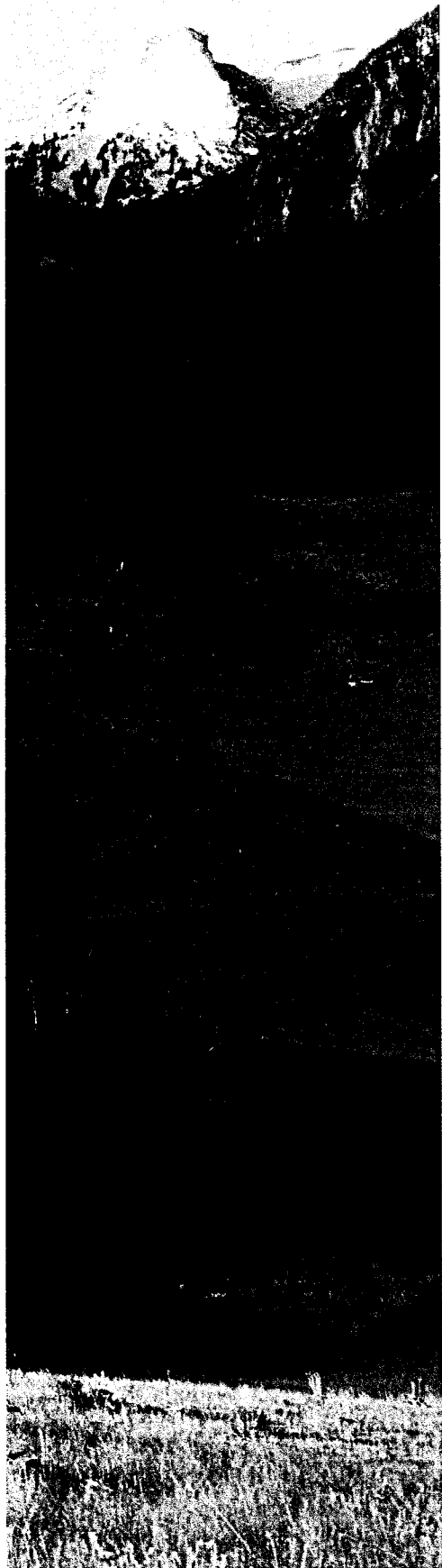
GOVERNOR BRIAN SCHWEITZER



DISCOVERING THE
MONTANA
BRAND



ABSAROKA RANGE



MISSOURI RIVER



BOGDANOVICH

A black and white photograph of a herd of bison in a snowy landscape. The bison are silhouetted against a bright, overexposed sky and snow-covered ground. They are arranged in a long, slightly curved line across the middle of the frame. Several bare, snow-laden trees are visible, with one large tree on the left and two smaller ones in the foreground. The overall scene is wintry and serene.

HOW WOULD

YELLOWSTONE NATIONAL PARK

YOU DESCRIBE MONTANA?

Now before you get ready to take a deep breath and profess some long-winded praise for the place, try doing it in a few words. TOUGH, HUH?

Well, that's what this book is for. It's here to help Montanans share our story with our visitors. To give you all the things that make up the brand of Montana and help put them into folks' heads simply. Succinctly. And, dare we say, with a romantic wit about it all.

Based on the research we've conducted, the following pages describe:

- + The pillars upon which our brand rests.
- + The tone that we'll use to communicate the brand.

We invite you to sit back. Read a bit. Take it all in. Then let this book do the talking for you.

WHAT IS A BRAND?

It's more than what you put on cattle. And while we do think our state should leave a lasting impression on folks, we hope you will do it in a less painful way. Our brand is not some fancy ad slogan, logo or tagline. Or everyone throwing in everything they like. That's what soup is for.

Simply put, a brand is:

- + The essential attributes that distinguish Montana from its competitors.
- + The direct or indirect experience guests have with our state.
- + The public perception of those who visit or live in Montana.
- + A strategic roadmap for advertising, marketing and promotion.
- + Something that does not change from year to year.



INDIAN NATION



AMOUNT
PURCHASED

WHY IS A BRAND

IMPORTANT?

As much as Montana has grown over the years, this remains a straight-up, know-your-neighbor, Main Street kind of place. Jargon, particularly of the marketing type, is not much appreciated. Yet by all accounts, there's no shortage of marketing around here. When you add up all the money spent by the various businesses and organizations promoting Montana, it tallies nearly \$80 million, according to a recent estimate.

But true to the rugged individuality that we're often noted for, there has, unfortunately, been little coordination of those marketing efforts.

That's why a brand is important. It unites us. Like the settlers who came here in the 1800s and the native peoples before them, more is accomplished to a greater degree of success when we work together toward a common goal.

Branding Montana will:

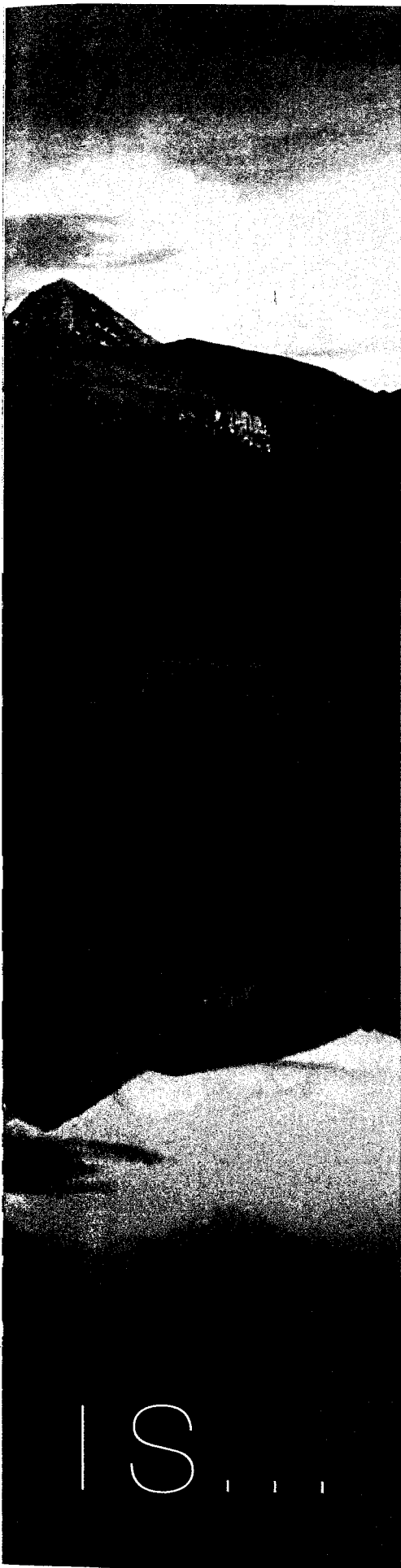
- + Unite our efforts to market Montana with a more cohesive voice.
- + Give Montanans the tools they need to market the state with this unified voice.
- + Bolster Montana's economic success and its \$3 billion tourism industry.
- + Help all Montanans work together to preserve and enhance the true assets of this state. The people, the towns and the natural environments.



STARTING WITH OUR BEST FOOT FORWARD,
LET'S DEFINE WHAT
WE REALLY ARE.

MONTANA

MISSION MOUNTAINS



IS...



JEFFERSON RIVER VALLEY



BIGHORN RIVER

EXHIBIT NO. 5
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BESIDES SAVING YOU MONEY, MONTANA OFFERS

- EASY PERMITTING
- FILM-FRIENDLY BUSINESSES & SERVICES
- FABULOUS DIVERSE LOCATIONS
- GREAT CREWS WITH YEARS OF EXPERIENCE
- AUTHENTIC WESTERN TOWNS AND SETS
- STUNNING PANORAMIC VISTAS

For more information or a certification form, visit our website at www.montanafilmm.com



Montana Film Office • Department of Commerce
301 S. Park Helena, MT 59820
800-555-4663 • 406-841-2876 • FAX: 406-841-2877
montanafilm@vishnt.com

**THE BIG SKY
ON THE BIG SCREEN ACT**

AN INCENTIVE FOR FILM PRODUCTION IN MONTANA



BIGGER SKIES. BIGGER EVERYTHING.

FILM IN MONTANA, GET BIGGER SAVINGS

MONTANA PAYROLL REBATES

EXPENDITURE REBATES

TAX RELIEF

14%

99%

NO SALES TAX

HIRE MONTANA CREW AND LABOR
for your production, and get a 14% rebate on the first \$50,000 in wages paid to each Montana resident.

When your production spends money on hotels and lodging, production equipment rentals, fuel, expendables, and lumber, we'll give you 9% back.

Montana has **NO GENERAL SALES TAX**, which makes it even more affordable to film here.

AND REMEMBER: MONTANA'S INCENTIVE HAS NO CAP AND NO MINIMUM SPENDING REQUIREMENTS.

THE BIG SKY ON THE BIG SCREEN ACT: HOW IT WORKS

Your producer contacts the Montana Department of Commerce Film Office and requests a certification application form BEFORE filming starts. 800-553-4533 or montanafilms@visitmt.com.

Your producer completes form, including applicable business and production information. Then sends it to the Montana Film Office with a copy of the script.

The Montana Film Office reviews your application, assigns a certification number, and submits it to the Department of Revenue along with your producer's contact information.

Come to Montana, hire Montana crew, use Montana services, and have an all-around great shoot. Keeping all receipts and financial records.

After shooting, you compile your receipts, expenditures, and other financial records. Then send them to the Montana Film Office.

After review, you receive your rebate. The Montana Film Office will also provide you with a copy of your certification number and other information.

REMEMBER TO GET CERTIFIED BY THE MONTANA FILM OFFICE BEFORE FILMING.



Montana State Legislature

2011 Session

Exhibit 5

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MONTANA

2011-2012 GUIDEBOOK

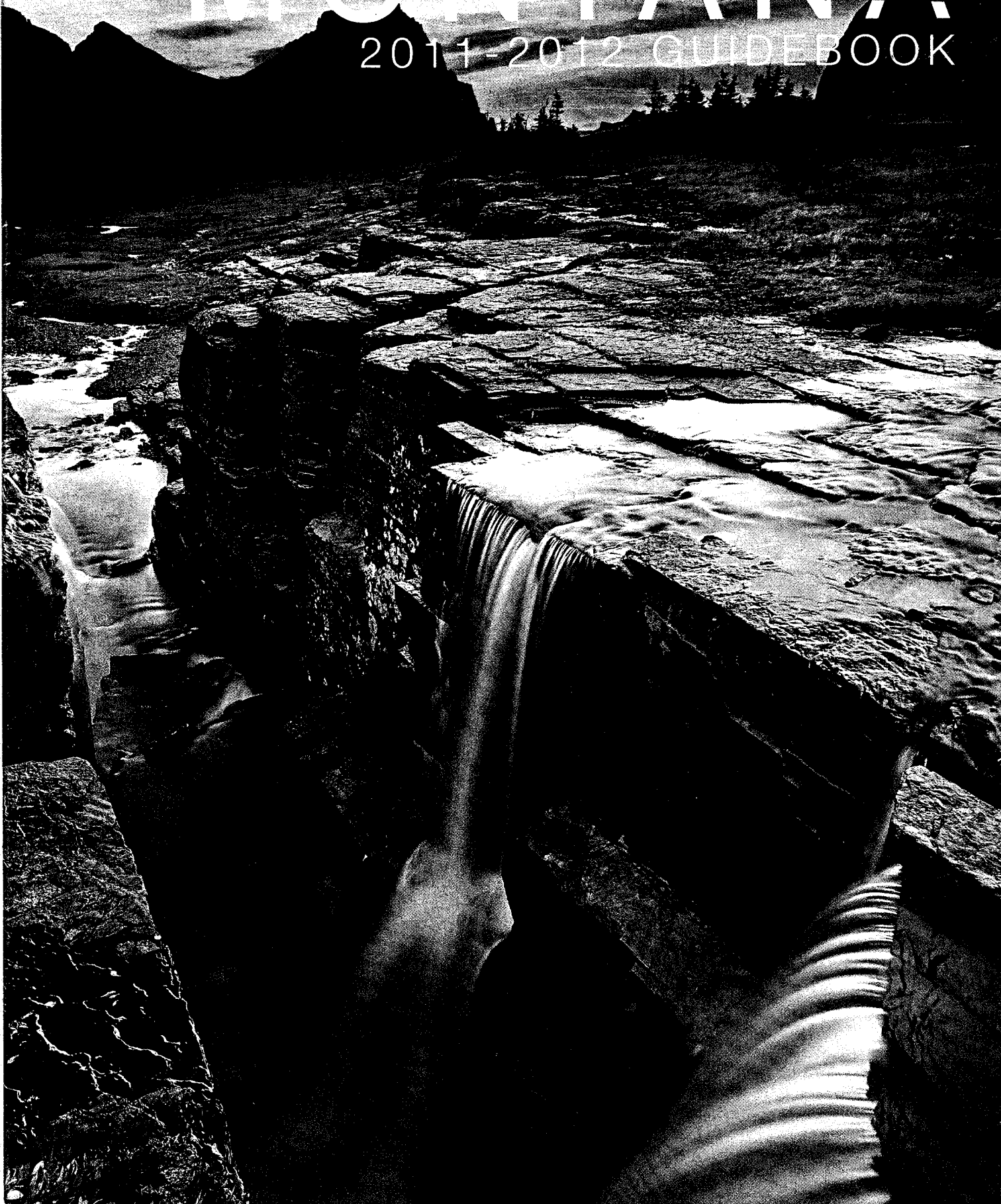
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DATE

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5
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Cover



NA DEBOOK



TAKE YOUR TIME AND EXPLORE WHAT FOLKS IN MONTANA ALREADY KNOW.

This is the land of spectacular unspoiled nature, vibrant and charming small towns, and breathtaking experiences by day with relaxing hospitality at night. Blue-ribbon streams, majestic mountains and wide-open spaces along with abundant history, art and cultural resources offer visitors unmatched opportunities for the entire family. Your travels in Montana will create memories that last a lifetime, as mine have. On behalf of the gracious warm people of Montana and as the governor of the last best place, it is my pleasure and honor to invite you to visit our beautiful state and discover the treasure that is

MONTANA

Brian Schweitzer
Governor of Montana

Cover Photo: Double Falls, Glacier National Park, Sean Bagshaw

MISSOURI RIVER COUNTRY
NORTHEAST

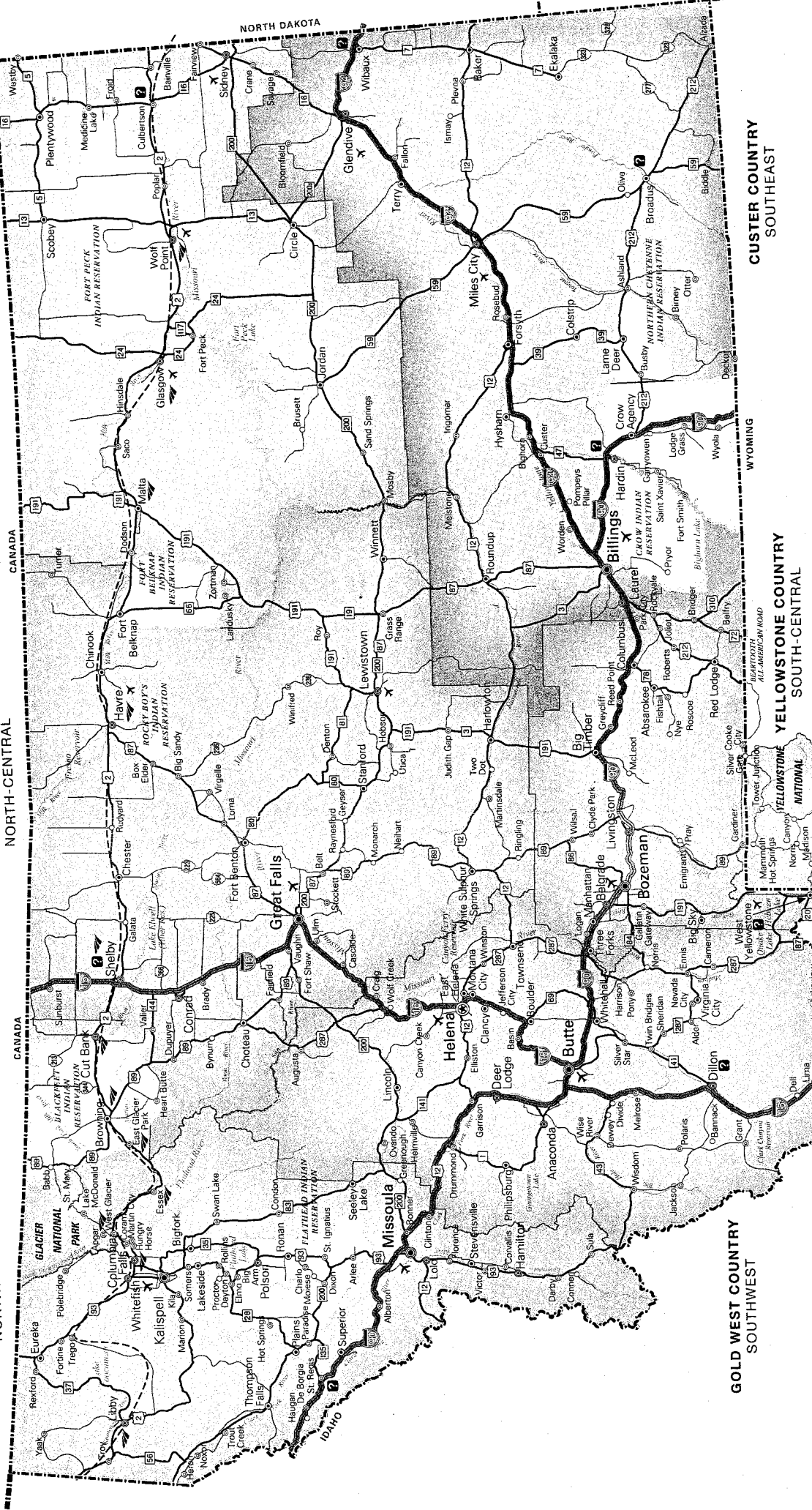
CUSTER COUNTRY
SOUTHEAST

YELLOWSTONE COUNTRY
SOUTH-CENTRAL

GOLD WEST COUNTRY
SOUTHWEST

RUSSELL COUNTRY
NORTH-CENTRAL

GLACIER COUNTRY
NORTHWEST



MONTANA

2011-2012 GUIDEBOOK

DePuy Creek near Livingston, Dusan Smetana


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Learn more about what makes Montana one of America's premier vacation destinations.

ONLINE www.visitmt.com

MOBILE m.visitmt.com

 **TWITTER** www.twitter.com/visitmontana

 **FACEBOOK** www.facebook.com/visitmontana



IN A SENSE IT WAS NEVER CONQUERED AT ALL

West of the 100th meridian the traveler came upon a land that required of him new skills to traverse it and different techniques to conquer it. Indeed, so formidable was this land that in a sense it was never conquered at all. — K. Ross Toole, *Montana, An Uncommon Land*.

MONTANA VISITMT.COM

WELCOME TO MONTANA

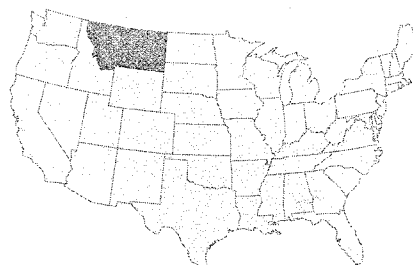
With more than 94 million acres of land and less than a million residents, Montana boasts more scenic views and wildlife than people. Glacier National Park, with its soaring peaks, and Yellowstone National Park, with its sizzling geothermal wonders, draw visitors from all over the world. But Montana's renowned beauty stretches across the state, rewarding those who venture off the beaten path. Paddle the white cliffs of the Wild and Scenic Missouri River, tour the C.M. Russell National Wildlife Refuge and gaze into the dizzying rock formations of the Bighorn Canyon National Recreation Area to see what we mean. That is, if you aren't already distracted by the state's 24 mountain ranges.

But back to those less than a million Montanans. Montana's residents can be found in a handful of small, unexpectedly cultural cities and in the down-home, homegrown gas-station-and-grain-elevator towns sprinkled in between. With them, you'll find a true sense of hospitality, not to mention more than a few quirky places to stay, delicious places to eat and more than one reason to raise a glass. People here eagerly share their own version of the good life, whether it's casting a line into the Madison River, peering into petroglyph-painted caves, diving into a bison burger or spotting a grizzly. In fact, you'll find the definition of the good life varies quite a bit in the space from the Gore-Tex-clad recreation outpost of Whitefish to the rough-riding cowboy town of Miles City.

That's why it makes sense to break up your journey to the big state of Montana into regions, and come back often. (That, and the whole 94 million-acre thing.) Every region has its own personality and unique offerings, on top of the great recreation and beautiful views the whole state is known for. So whether

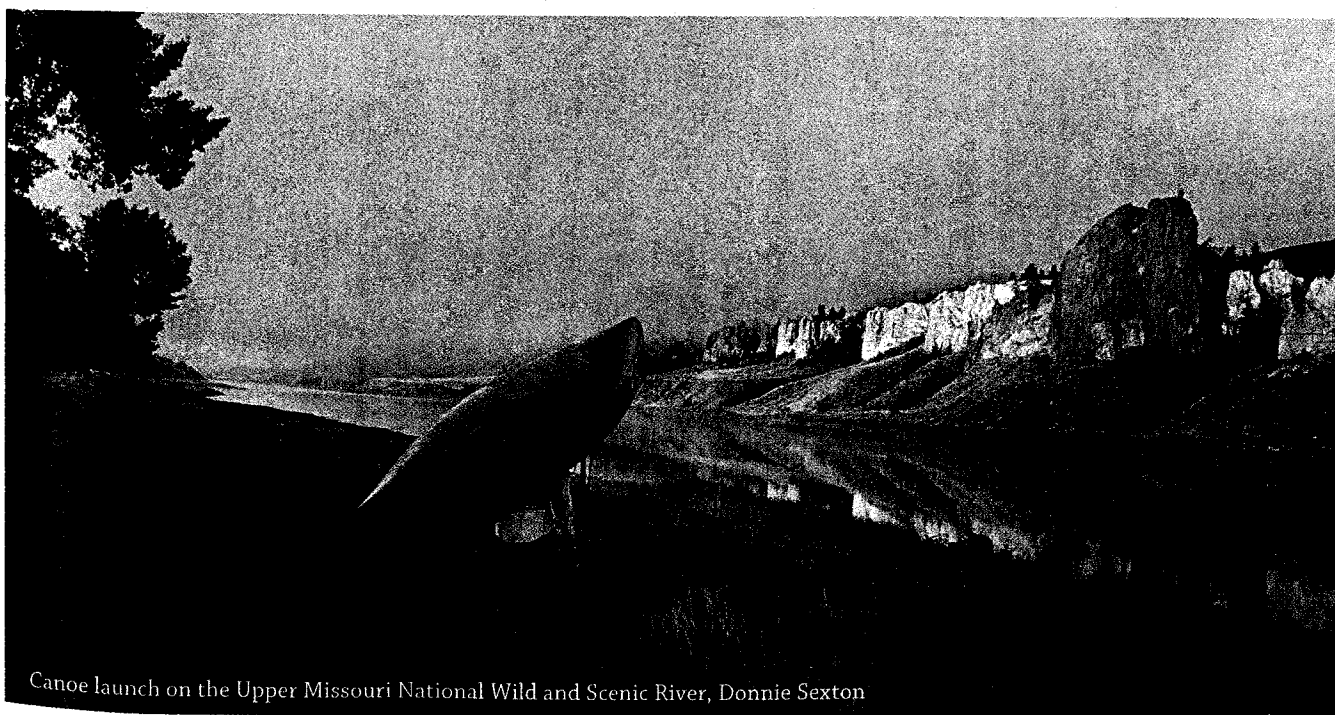
your dream is to bag peaks, hook trout, soak up western history, watch wild creatures or just breathe, this guide will help you find the best (and some of the best-hidden) ways to do so. Welcome to Montana.

MONTANA



- + Size: 147,138 square miles (4th largest in U.S.)
- + Became the 41st state on November 8, 1889
- + Population: 989,415
- + State Name: From the Latin word *montaanus*, which means "mountainous"
- + State Bird: Western Meadowlark
- + State Flower: Bitterroot
- + State Tree: Ponderosa Pine
- + National Parks: Two (Yellowstone and Glacier)

For more facts about Montana, visit www.visitmt.com/facts



Canoe launch on the Upper Missouri National Wild and Scenic River, Donnie Sexton

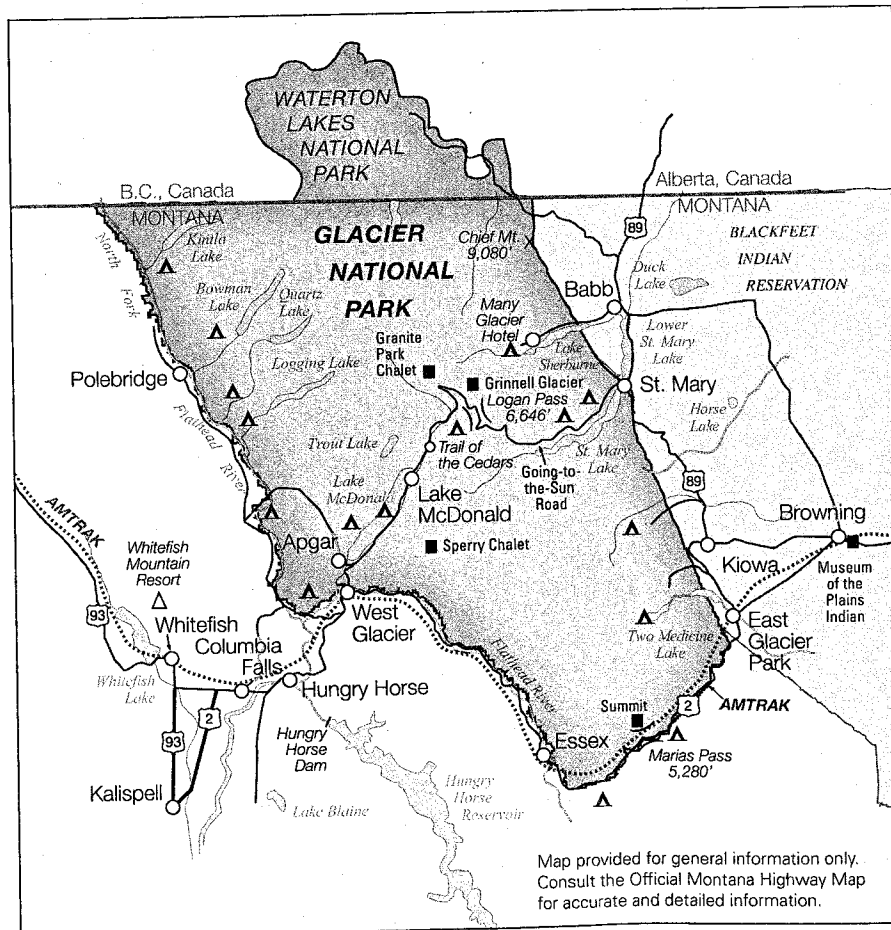
Mt. Gould and Mt. Grinnell reflect Swiftcurrent Lake, Glacier National Park, John Reddy

GLACIER AREA ITINERARY SUGGESTIONS

The following one-day, three-day and five-day sample itineraries are provided to give you some ideas on what to do in the Glacier Area. For more in-depth information and ideas, visit these websites:
www.visitmt.com/glac
www.crownofthecontinent.net
www.nps.gov/glac

ONE DAY

- + Visit Glacier National Park
 - Drive Going-to-the-Sun Road with stops at St. Mary, Logan Pass and Apgar.
 - For a Blackfeet perspective, take a tour with Sun Tours.
 - Hike one or many of the trails in the park.
 - Take a boat tour on Lake McDonald or St. Mary Lake.
- + Spend the day in Whitefish and play at Whitefish Mountain Resort



FIVE DAYS

+ Explore Glacier on your own by hiking into the backcountry for several days. There are more than 700 miles of trails within the park's boundaries. You will need a backcountry permit and information on rules and regulations before you go. Check out www.nps.gov/glac.

+ If you aren't keen on backpacking into the wilds of Glacier on your own, hire a guide to take you. Several options are available.

+ Explore the park with long day hikes and stay at the historic lodges or even in a caboose at night. Take one of the three-day loop tours, starting in the east or west, and spend more time in one or all of the areas along the way.

+ Immerse yourself in Glacier and surrounding communities. Start on the east side by watching the sunrise at Chief Mountain, northeast of the park. Spend time in Browning and other areas of the Blackfeet Indian Reservation, learning about the history and the "Backbone of Mother Earth" from the people who have lived here for thousands of years. Soak in their culture and stories. Take a boat tour on St. Mary Lake. Head through the mountains on Going-to-the-Sun Road. Spend time at Lake McDonald and in Apgar. Enjoy some day hikes along the way.

+ Starting out in Kalispell or other west-side locations? Split your time between Glacier National Park and the many interesting communities and sites. Spend time in communities like Kalispell and Polebridge. Kalispell offers cultural opportunities such as the Hockaday Museum of Art where you'll find an excellent collection of works from local artists and a permanent exhibit on Glacier National Park. Also spend time at the Conrad Mansion, listed on the National Register of Historic Places. For a shift in experiences, head to Polebridge, a 45-minute drive from the West Glacier entrance, on a gravel road. The community is small and off the grid with no electricity and no cell phone service. Check out the mercantile, home of some famous baked goods, and the saloon. Don't forget to visit Hungry Horse and the Hungry Horse Dam.

+ Visit the Blackfeet Indian Reservation and tour the Museum of the Plains Indian in Browning.

+ Raft the Flathead River.

+ Cross-country ski or snowshoe into Glacier and surrounding areas in the winter.

+ Take US 2 along the southern edge of Glacier between East Glacier Park and West Glacier. This route follows the Amtrak route and goes over 5,280 foot Marias Pass.

+ Mountain bike one of the many trails on public lands outside of Glacier National Park.

stops at Logan Pass and St. Mary. End your day with a sunset cruise on St. Mary Lake. Day three, travel along US 2 through Essex and back to the west side of the park.

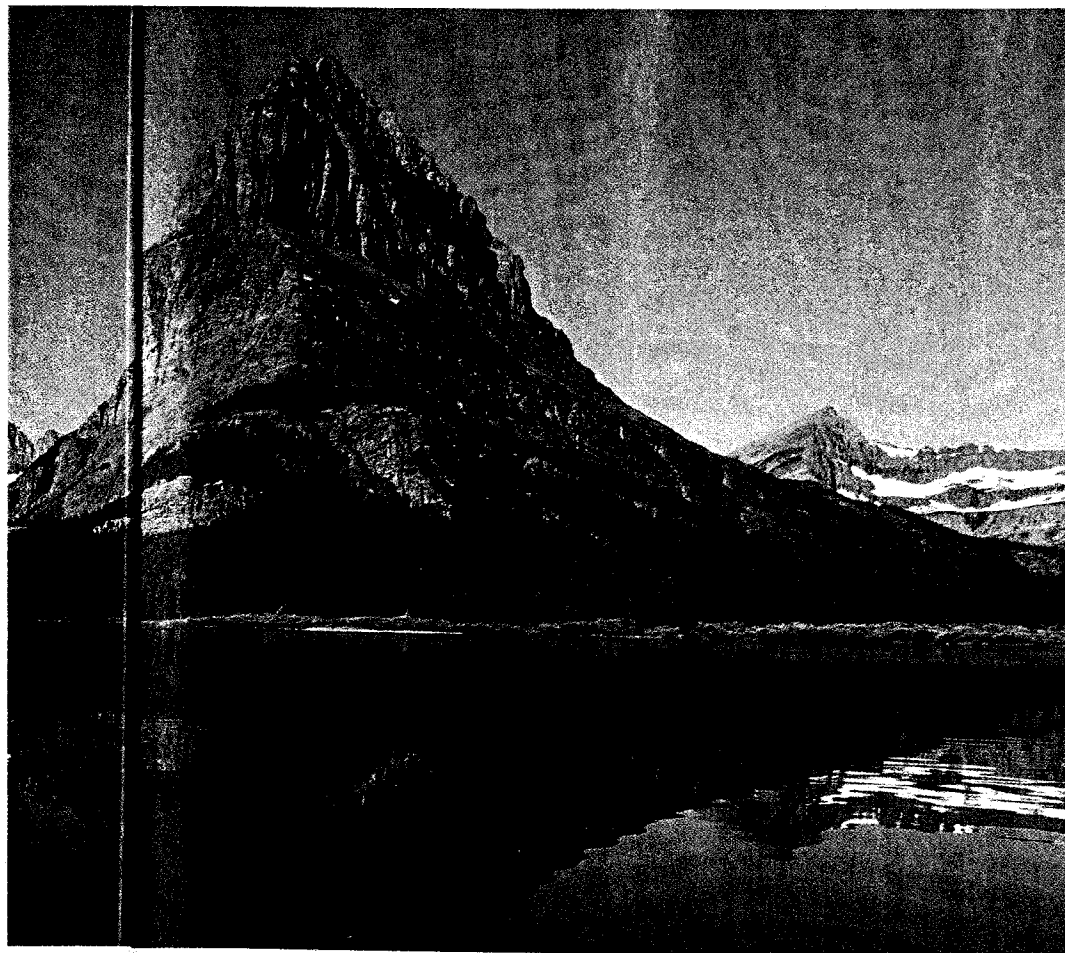
+ Starting on the east side of the Glacier area, spend a day in the Many Glacier area canoeing, horseback riding or hiking on your own or with a naturalist on a hike to Grinnell Glacier. Spend your second day going through Glacier via the Going-to-the-Sun Road with stops at St. Mary, Logan Pass and Trail of the Cedars. End your day at Lake McDonald Lodge. To complete your three-day adventure, head back to the east side by way of US 2 through Essex and East Glacier Park.

+ Bike through Glacier on the Going-to-the-Sun Road. Many camp areas in the park offer hiker/biker-only sites. Get biking guidelines from www.nps.gov/glac, as there are some restrictions on times and places for biking.

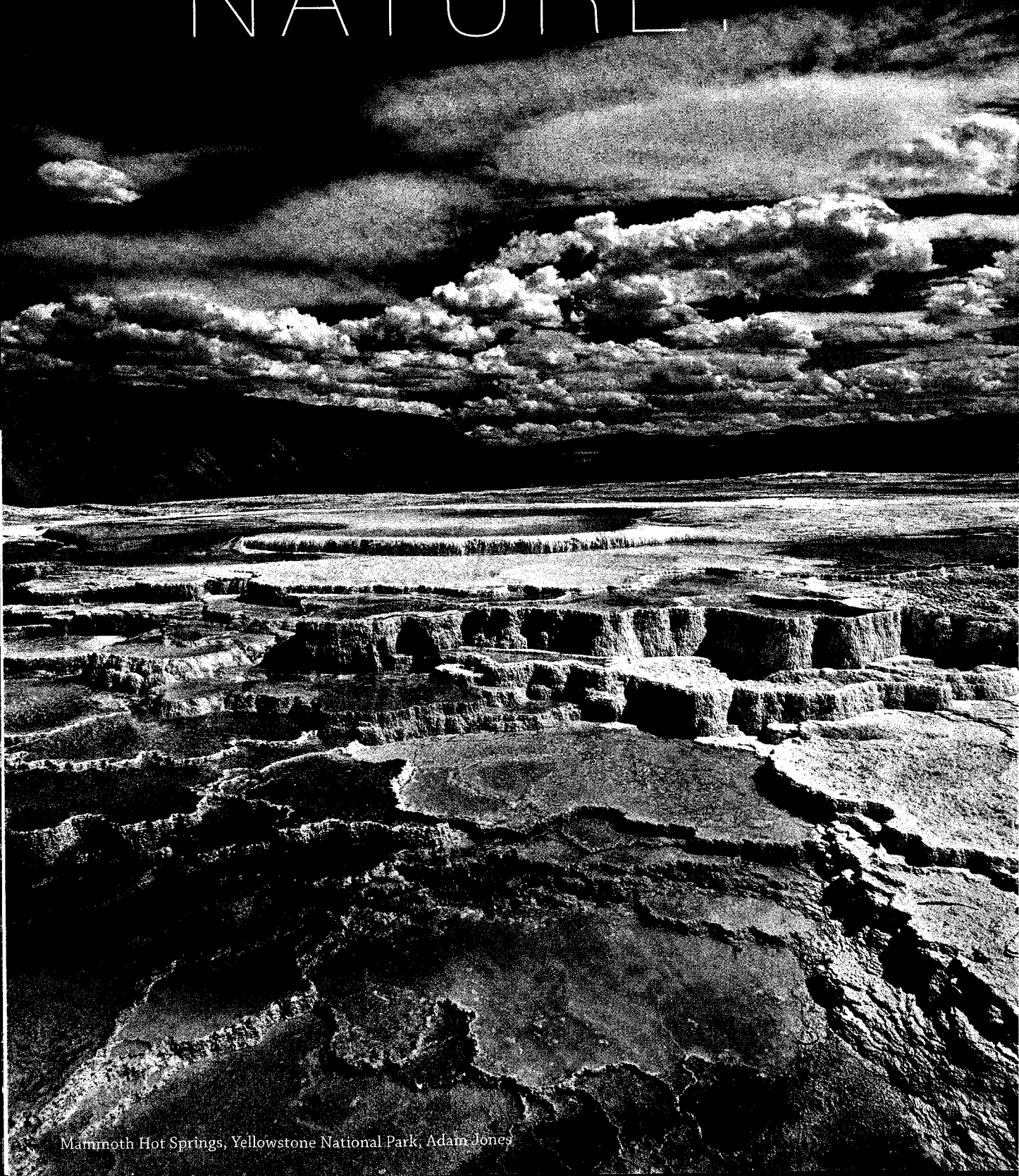
+ Combine several of the one-day activities into your own three-day adventure.

THREE DAYS

+ Starting on the west side of the Glacier area, spend a day in Whitefish with a stop at Whitefish Mountain Resort for the Walk in the Treetops, then with a visit to museums and downtown. End the day at one of the many unique restaurants in town. Day two, head east and through Glacier over Going-to-the-Sun Road with



SHAPED BY NATURE.



Mammoth Hot Springs, Yellowstone National Park, Adam Jones

AN INTERVIEW WITH MONTANA NATURALIST CASEY ANDERSON

As the host of a popular series on the National Geographic Channel, Casey Anderson explores some incredible places.



Appropriately titled *Expedition Wild*, the show stars Anderson and his best friend, a 900-pound grizzly bear named Brutus.

Montana journalist Scott McMillion talks with Anderson, a fifth-generation Montanan who lives a short drive from Yellowstone National Park.

Scott McMillion: You spend a lot of time handling Brutus. Has he ever hurt you?

Casey Anderson: Just by rolling over on me, wrestling and playing around. But I'm pretty careful around him. He's 100 percent grizzly bear and I never forget that. And I never try to make him do anything he doesn't want to do. That helps to avoid any problems.

SM: You've had the Montana Grizzly Encounter, where Brutus lives, for eight years now. How did you get started?

CA: It began when I rescued a couple bears from bad situations in captivity. These bears could never survive in the wild, so we built the next best thing for them. We've got four bears now. The joke is that my mom ran a homeless shelter for 25 years and my dad was a mountain man. Now I give homes to homeless grizzly bears. They're happy at the sanctuary and they get to be ambassadors.

SM: Ambassadors? How so?

CA: People have a lot of fear and misconceptions about bears. I want to replace that with knowledge and respect. The sanctuary, just east of Bozeman, is open to the public and we've got a strong educational program. Teaching people about grizzlies will help the wild bears and wild ecosystems, like Yellowstone. I take the same approach in the TV shows.

SM: Your show takes viewers to some pretty isolated country. Do you ever go out there without the camera crew?

CA: All the time. If I'm not working I'm usually doing the same things I do on TV: studying wildlife, tracking, looking around. It's a passion. It's my life. If the cameras went away tomorrow, I'd still be doing it.

SM: How come you're still living in Montana?

CA: I've made documentaries in Africa and India, and those are wonderful wild places. But when I come back, I feel a sense of home. There's just something about this place, something better. I think a lot of people don't realize just how wild the backcountry around Yellowstone truly is. Yet it's still pretty accessible.

SM: True. But maybe it's not for everybody.

CA: Probably not. But Montana has a gift to give you, if you let it happen. It's a place where you can listen for silence and

find it. You can live in the moment and truly feel your feet on the ground. You might call it meditation or some kind of spiritual moment. But it's something that's possible here.

SM: Even in grizzly country?

CA: Especially in grizzly country. As humans, we're encouraged to get away from our senses and live behind walls. But when you're out in grizzly country, your sense of smell sharpens. So does your eyesight and your hearing. And you have a better experience because you're paying more attention.

SM: What's it take to do that?

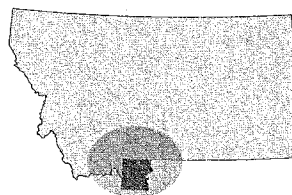
CA: Get some maps, find a trailhead and go. Even if you just walk a mile and sit on a log for a while. Be prepared, but don't be afraid to wing it. Just go. You'll be fine.

SM: Do you take Brutus out on big hikes?

CA: Whenever he's outside the sanctuary for film work, which is only about 5 percent of the time, the situation is carefully managed. State wildlife officials know exactly where he is and there's a portable electric fence around him. Nobody is allowed inside the fence except me and my crew.

Like I said, I never try to make him do anything he doesn't want to do. But he likes to go on adventures. Whenever he sees his trailer he gets ecstatic because he knows he's going to climb on a car or catch a fish or swim in a pond or something, and everybody's going to be standing around telling him how beautiful he is. He likes that.

YELLOWSTONE NATIONAL PARK



- + America's (and the world's) first national park, established in 1872
- + 3,472 square miles (2,221,766 acres), larger than Rhode Island and Delaware combined
- + Access from West Yellowstone, Gardiner or Cooke City
- + Approximately 10,000 thermal features
- + Over 300 geysers
- + Home to 60+ species of mammals including grizzlies and bison
- + 950 miles of backcountry trails

For more information visit www.visitmt.com/yell

Montana State Legislature

2011 Session

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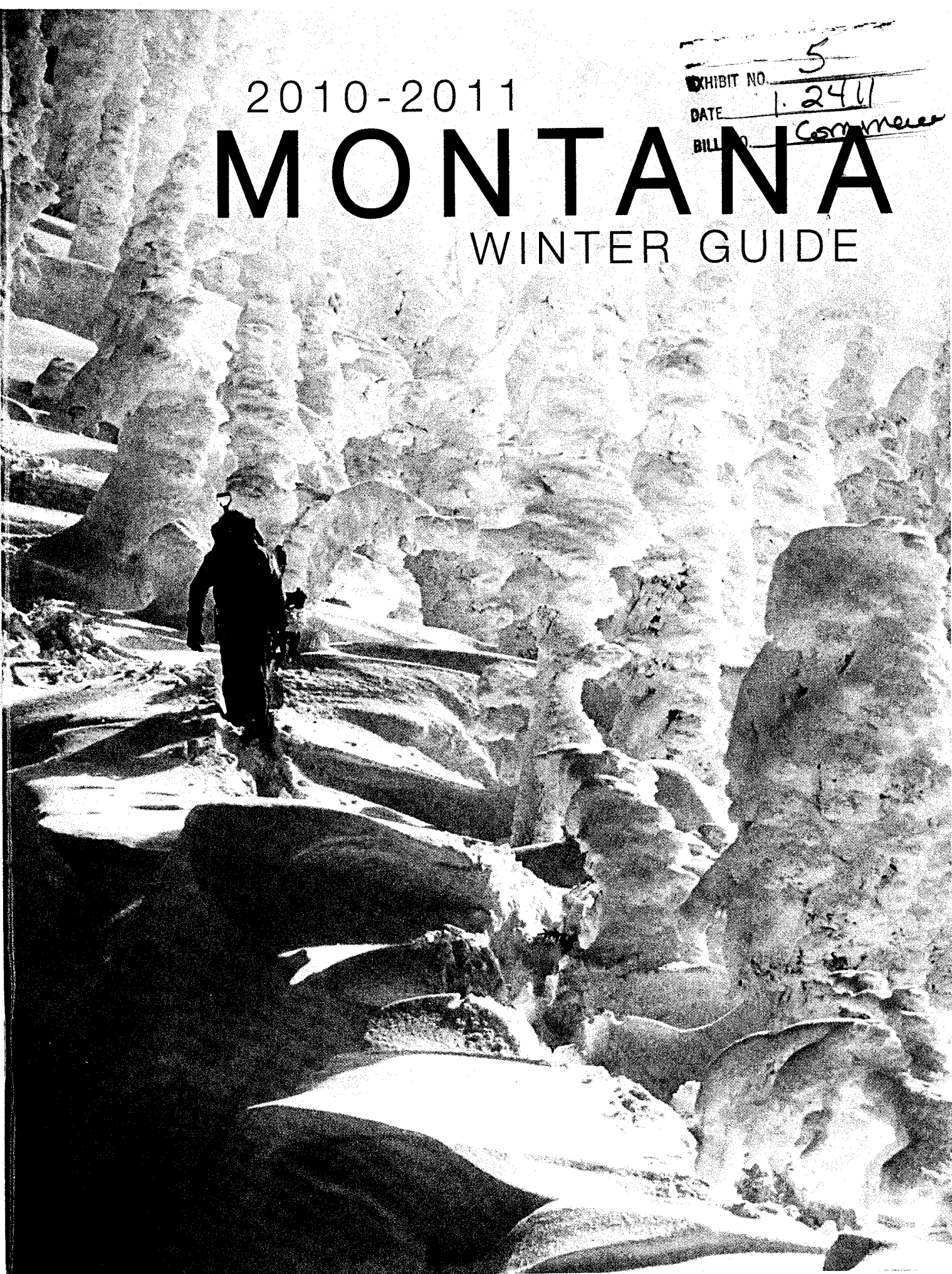
MONTANA

WINTER GUIDE

EXHIBIT NO. 5

DATE 1.24.11

BILL Commerce





It gives me great pleasure to invite you to Big Sky Country. Montana has long been known as a fantastic place to play and the fun doesn't stop in winter. So bring your family and friends and take advantage of all the exciting experiences available under our big sky. You'll find the hospitality and good cheer of my fellow Montanans will warm your soul and keep you coming back to enjoy all the treasures of this gorgeous state. Welcome.

Sincerely,

A stylized, handwritten signature of Brian Schweitzer in dark ink. The signature is fluid and cursive, with a prominent 'B' and 'S'.

Brian Schweitzer,
Governor of Montana



SKI AREAS & RESORTS GLACIERS & YELLOWSTONE THINGS TO DO PLACES TO STAY LOCALS TRANSPORTATION VISITOR SERVICES MT.GOV



SNOW REPORT
Conditions at each of Montana's ski areas and resorts >



LEARN TO SKI IN 3
Need to learn the basics? Maybe break up on your skills? Here's just the thing to get you going.
Learn to Ski or Ride >



WINTER SAVINGS
Special deals and packages this winter.
Learn More >



FREE VACATION PLANNER
Order or View Online >



SNOW REPORTS
Conditions at Montana's ski areas.
Learn More >



WARM SEASON
Trip planning information for the other seasons.
Learn More >

Winter
Tweaking all winter long >

SKI AREA LODGING
Find alpine-specific accommodations >

NORDIC SKING
Cross-country ski information and trails >

WINTER EVENTS
Dates, times and details >

SNOWCOACH TOURS
A unique way to experience the Montana winter >

2010-2011 MONTANA WINTER GUIDE

See why Montana has become legendary for winter vacations. Log on to wintermt.com and start planning.

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Photos: (cover) snowghosts, near Bigfork—Scott Spiker; (back cover) fun in the snow—Chuck Haney; (inside front cover) high fives—Chuck Haney

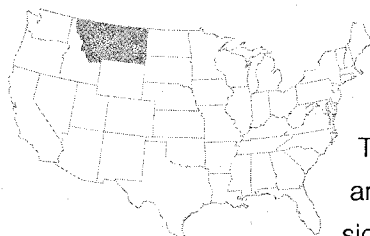


FIND OUT WHY IT'S KNOWN AS THE TREASURE STATE

EXPERIENCE MONTANA

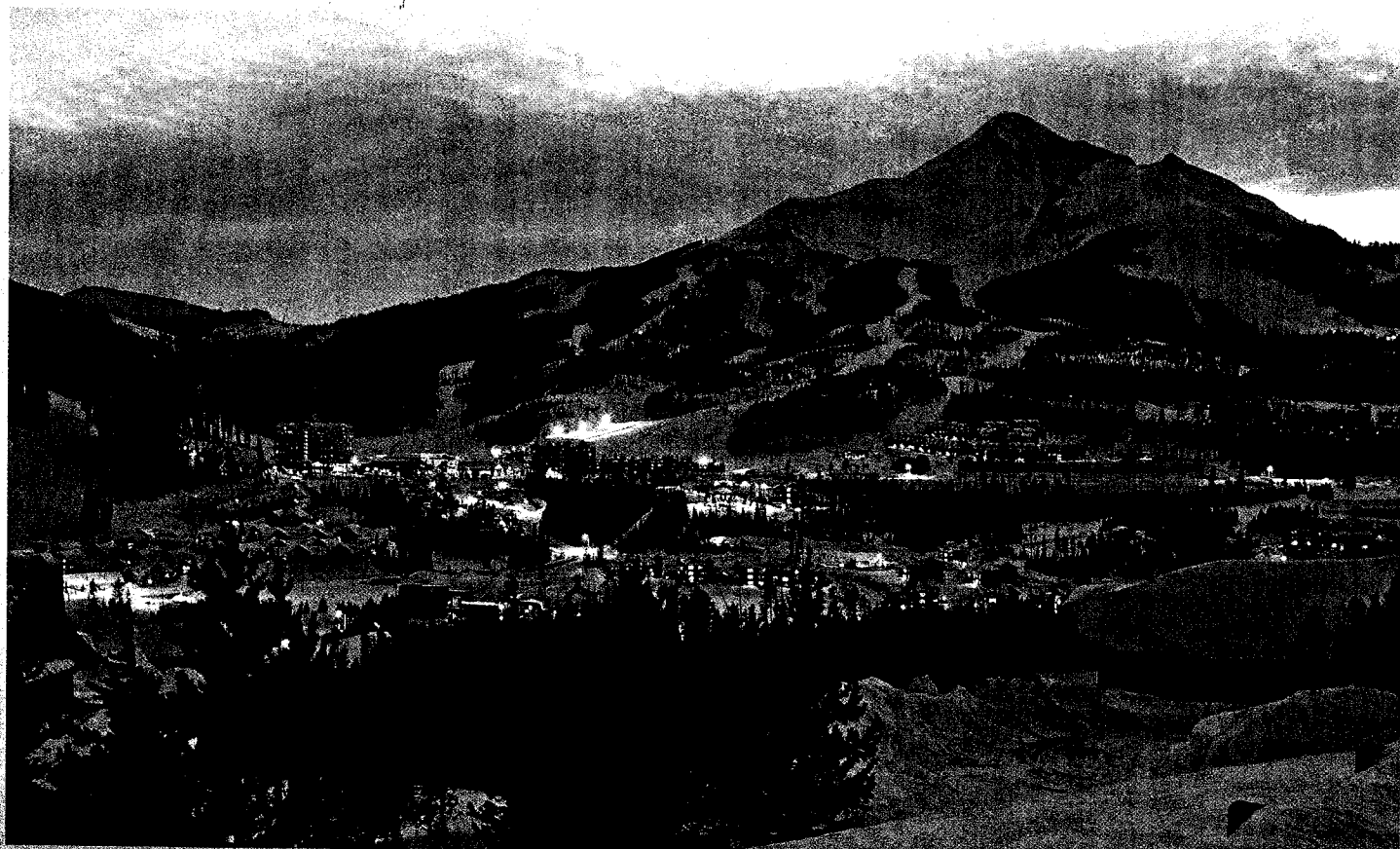
When describing Montana, adjectives fall like snow on a mountain peak. "Breathtaking," "majestic," "flawless," "gorgeous" and of course, "awesome" immediately come to mind. Some of America's greatest writers have used these superlatives to convey the unique feel that Montana inspires. But words alone cannot do her justice. This much beauty, character and history have to be lived firsthand. For Montana is more than just a state—it's an experience that stimulates the senses and stirs the soul. And it's an experience that should be lived by everyone at least once in their lifetime.

Anyone who has laid eyes on our endless blue sky, crystal-clear waters and mammoth mountains knows that Montana leaves an impression that won't soon be forgotten.



This winter, let Montana charm you and your family with her wondrous sights and thrilling activities. "Big Sky Country" is full of warm people who will take the chill out of winter and welcome you to their charming small towns and exciting cities as you vacation in our amazing Treasure State.

*Photos: (left) skier at Bridger Bowl Ski Area—www.wildwestphotos.com;
(below) Big Sky Resort at night—Craig Moore*



BROADEN YOUR WINTER HORIZONS

WINTER ACTIVITIES

Chances are, you're considering a trip to Montana in anticipation of our legendary outdoor winter adventures—like skiing or seeing the breathtaking Glacier and Yellowstone National Parks. But whatever it is that's tempting you, there are plenty of unique ways to complement your Montana vacation. And though these activities may be less heralded than those that have captured your attention, broadening your horizons might lead to a new favorite pastime.



For example, downhill skiers may want to explore the world of backcountry skiing. Imagine being the first skier to carve a powdery run in one of nature's biggest playgrounds. Montana is a vast place filled with untouched runs. It's also a great state to take up cross-country skiing. See Mother Nature at her best while trekking through some of our thousands of miles of groomed and ungroomed trails. Or imagine getting a bird's-eye view of our wintery beauty on a helicopter tour. You'll even find guided helicopter ski trips. Afraid of heights? Try a snowcoach or snowmobile tour in some of the most challenging and beautiful terrain in the world.

Many anglers only think of Big Sky Country during the warmer months, but the fish are still here in winter. Ice fishing and winter fly fishing can be perfect cold-weather fun. Georgetown Lake, near Anaconda; Flathead Lake, south

of Kalispell; and Fort Peck Lake in northeast Montana are just a few of the many great places to drop your line in winter. You might land yourself some dough at the Ice Fishing Tournament at Fort Peck Lake's Marina Bay.

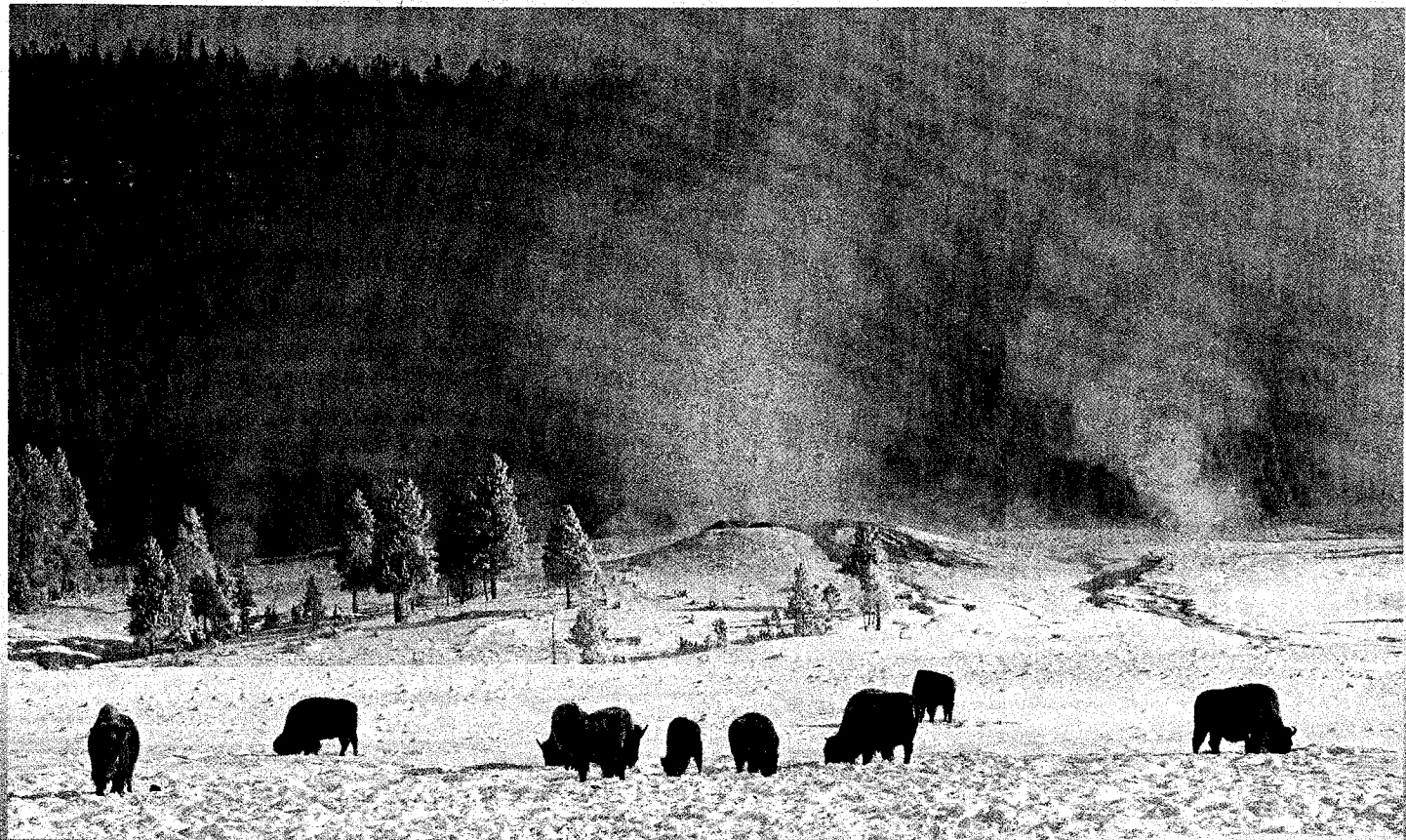
Non-anglers will find plenty of new things to do here as well. For example, many visitors are taking up snowshoeing, a rapidly growing and inexpensive activity. For those who want to try something faster, we offer novices and advanced

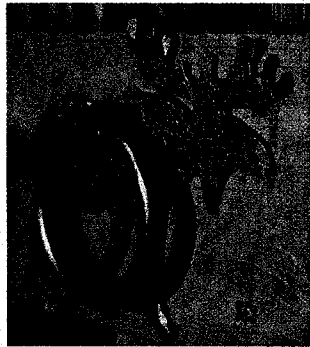
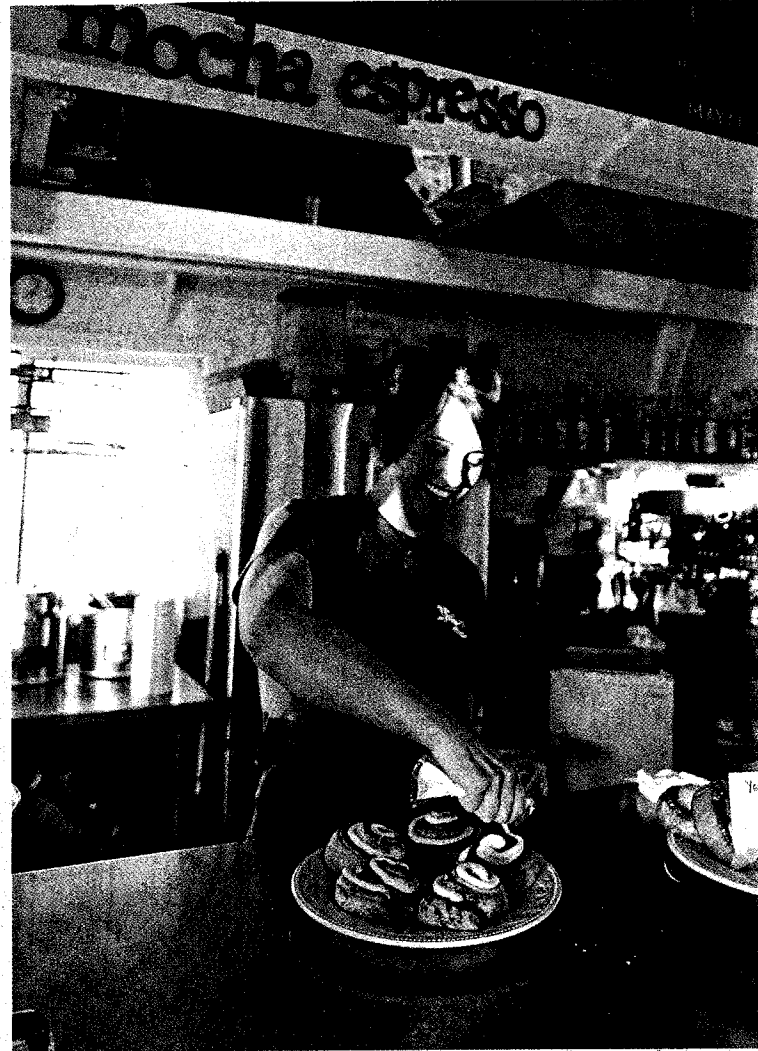
riders the thrill of commanding a team of sled dogs. Or maybe you'll want to take up skijoring, a blend of sleigh riding and cross-country skiing that involves having a dog or horse pull you.

Want to relax? Feel the pressures of the world evaporate at one of our more than two dozen developed "hot springs" destinations or 30 natural sites, all fed from natural geothermal features. Or, lace up your ice skates—on our ponds, lakes or rinks. Montana has the performing arts covered as well. The beautiful Alberta Bair Theatre in Billings, for example, offers off-Broadway plays, concerts and more.

So pick your favorite winter activity, add some new ones and start planning your Montana vacation now. Visit www.wintermt.com.

Photos: (this page) ice fishing—Tony Bynum; (opposite page, clockwise from top left) dogsledding near Ovando—Chuck Haney; sleigh ride at Izaak Walton Inn—William T. Elliott; bison in Yellowstone National Park—Carr Clifton





UNSPOILED & AUTHENTIC

ACCOMMODATIONS, DINING & URBANE ATTRACTIONS

There's plenty to love about Montana, and not all of it has to do with our great outdoors. In fact, both our charming towns and larger cities offer plenty to do before and after you've played outside.

For starters, we have hundreds of exciting museums and galleries that will fascinate your whole family, including Bozeman's dino-filled Museum of the Rockies and Great Falls' Lewis & Clark Interpretive Center, just to name a couple. We're also chock-full of historic trails and battlefields as well. And for those who feel a vacation isn't a vacation without a little shopping, we have plenty of unique shops, specialty stores and malls.

You may think that because Montana is such a

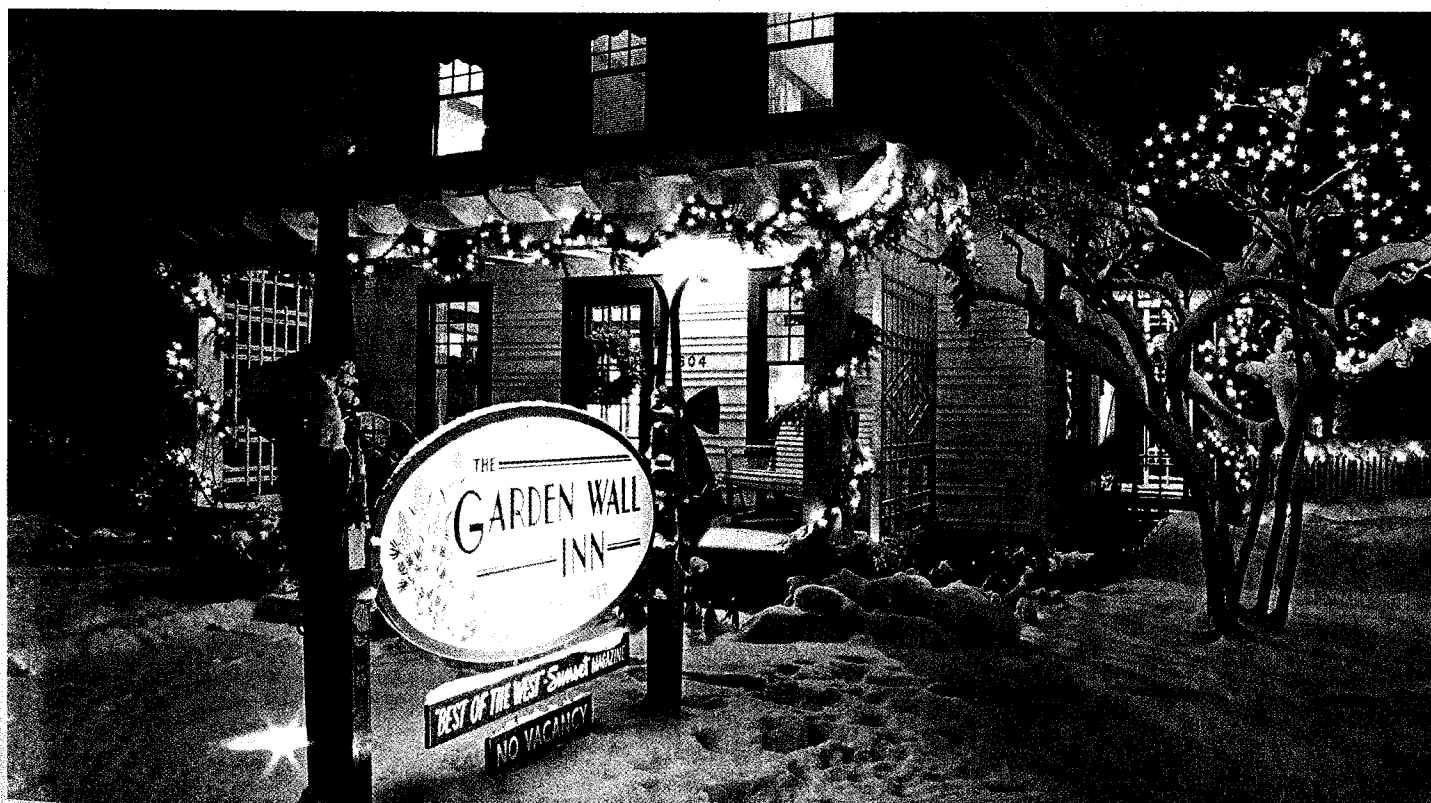
spectacular, uncrowded and unspoiled place, you'll sacrifice modern comforts. Nothing

could be further from the truth. Most visitors are surprised by Montana's vibrant nightlife. For example, you'll have no problem finding delicious restaurants to satisfy the most finicky of appetites as well as first-rate hotels and quaint bed & breakfasts.



When you consider all there is to do here, both inside and outside, you'll realize that Montana is more than just a beautiful state. We're the perfect winter vacation destination for everyone.

Photos: (opposite page, clockwise from top left) catch of the day—Lynn Donaldson; morning mocha and munchies—Craig Moore; celebrating the Montana memories—Juan de Santa Ana; gourmet dining—Donnie Sexton; moose door knocker—Lynn Donaldson; (this page) hot chocolate and marshmallows—Audrey Hall; Garden Wall Inn in Whitefish—Chuck Haney



MARK YOUR CALENDAR

EXPERIENCE WINTER IN MONTANA

17TH ANNUAL GLACIER JAZZ STAMPEDE OCTOBER 7-10, KALISPELL

The Annual Glacier Jazz Stampede promises to be a weekend to remember for Flathead Valley jazz enthusiasts and "new" fans that visit from outside the area. The toe-tapping music played at various venues draws jazz lovers from all musical backgrounds. Special Friday night swing dance with bands from 8:00 p.m. to 10:30 p.m.

406-755-6088 • www.glacierjazzstampede.com

YELLOWSTONE SKI FESTIVAL NOVEMBER 23-27, WEST YELLOWSTONE

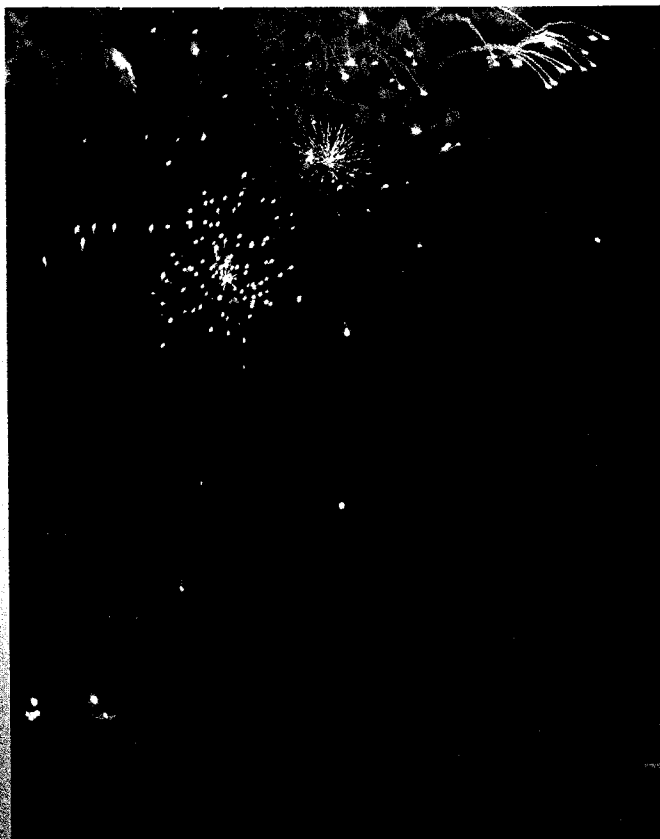
During November, West Yellowstone, Montana, comes alive for the annual Yellowstone Ski Festival. Thanksgiving week features technique clinics, manufacturers' exhibits and wax clinics mixed with an overall warm feeling of camaraderie. The clinics vary in length and fees. Official Nor-Am races cap the month.

406-599-4465 • www.yellowstoneskifestival.com

HOLIDAY CANDLELIGHT TOURS OF LEWIS & CLARK CAVERNS DECEMBER 18-29, WHITEHALL

Lewis and Clark Caverns State Park offers holiday candlelight tours in December, weather permitting. Reservations required. See the cave as the original discoverers did, by candlelight.

406-287-3541 • www.fwp.mt.gov/parks/events



MONTANA PRCA PRO RODEO CIRCUIT FINALS JANUARY 14-16, GREAT FALLS

Held at Montana ExpoPark in Great Falls, over 96 of Montana's best pro rodeo contestants travel to Great Falls to pit their wit and ability against the skill and heart of Montana's finest PRCA rodeo stock. Festivities include an auction Thursday before the rodeo and on Saturday afternoon. The Miss Rodeo Montana coronation is on Sunday.

406-727-8900 • www.goexpopark.com

SEELEY LAKE AREA WINTERFEST JANUARY 22-23, SEELEY LAKE

Winterfest kicks off with a torchlight parade, followed by the annual Christmas tree bonfire. Events include winter biathlon, which combines target shooting with Nordic skiing. Enjoy snow sculpture viewing and competition throughout the weekend.

406-677-2880 • www.seeleylakechamber.com

WHITEFISH WINTER CARNIVAL FEBRUARY 4-6, WHITEFISH

The Whitefish Winter Carnival features the Grand Parade and Kiddie Carnival on Saturday. Come join us and be a part of the fascinating mythology of Whitefish.

406-862-3501 • www.whitefishwintercarnival.com

RACE TO THE SKY SLED DOG RACE FEBRUARY 11-16, HELENA

This 350-mile cross-country distance sled dog race starts near Helena. Send the teams off and follow their progress as they race through the checkpoints and back to the finish near Lincoln. All checkpoints accessible by car. Spectators are encouraged to follow the race.

406-881-3647 • www.racetothsky.org

WILD WEST WINTERFEST FEBRUARY 18-20, BOZEMAN

Break your cabin fever, put on your coats and boots and join us for the 9th Annual Wild West WinterFest. Three days of fun, family events such as the All-Breed Horse Sale, Chili Cook-off, dog events, children's art show, hockey tournament, kids' activities and petting zoo, photography show, quilt show, the Sweetheart Fur and Feather Show and the Working Horse and Driver Competition. Between events enjoy delicious food, listen to music, and wander through the commercial exhibitor building.

406-582-3270 • www.wildwestwinterfest.org

NORTHERN DIVISION FREESTYLE COMPETITION FEBRUARY 19-20, MISSOULA

This annual event, sanctioned by the U.S.S.A., draws the best skiers in the area for moguls, freestyle competition and jumping.

406-549-9777 • www.montanasnobowl.com

Photo: Winter Carnival, Red Lodge - Donnie Sexton



2011 Session

Exhibit 5

**This exhibit is a booklet
which can not be scanned,
therefore only the front
cover/table of content and
10 pages have been scanned
to aid in your research.**

**The original exhibits are on file at the
Montana Historical Society and may be
viewed there.**

**Montana Historical
Society Archives
225 N. Roberts
Helena MT 59620-1201
2011 Legislative Scanner Susie Hamilton**

EXHIBIT NO.

5

DATE

1.24.11

BILL NO.

Commerce

MONTANA

ANNUAL OFFICE OF TOURISM REPORT | 2010

A SHORT WORD



"Montana attracts many visitors to our spectacular landscapes and authentic places. I appreciate the work our tourism industry is doing in building Montana's brand. Our 10 million annual visitors are a significant asset to our Main Street businesses and I'm proud to share Montana's unparalleled experiences with those fortunate enough to visit."

— Governor Brian Schweitzer

This Annual Report provides an overview of the collective strategies and combined efforts of the Montana Office of Tourism. Although it was a turbulent year with unprecedented economic conditions, we remained committed to our mission.

We concentrated on delivering a cohesive message by integrating the new statewide tourism brand into all of our consumer-facing promotional efforts. We focused on the Geotraveler, our target market who has the highest propensity to appreciate the Montana experience. And, although we didn't see our customary increases in visitation or visitor spending, Montana did fare better as a whole than our competitor states.

As we transition into a new decade, we will remain dedicated to being good stewards of the "bed tax" dollars that we receive. We will continue striving to improve Montana's economic vitality while maintaining an exceptional visitor experience and preserving Montana's quality of life.

Betsy Baumgart
Administrator

GOVERNOR-APPOINTED TOURISM ADVISORY COUNCIL:

Stan Ozark, Chair, Glasgow | Ed DesRosier, Vice Chair, East Glacier Park | Cyndy Andrus, Bozeman
Sandra Cahill, Livingston | Rhonda Fitzgerald, Whitefish | Beverly Harbaugh, Jordan | Ramona Holt, Lolo
Kim Holzer, Stanford | Bill McGladdery, Butte | Meg O'Leary, Big Sky | Dolores Plumage, Chinook
Paul Tuss, Havre | Sandy Watts, Garryowen | Amber Wood-Jensen, Butte | Jackie Yellowtail, Crow Nation

WHEN WE SERVE VISITORS WE SERVE MONTANANS

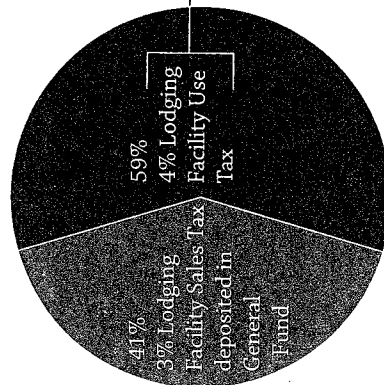
Tourism has a rich history in Montana. From native tribes hosting the first white explorers, to the designation of Yellowstone National Park (the world's first), to modern-day events like the Miles City Bucking Horse Sale or the National Folk Festival in Butte, travelers have long been drawn to the magnificent natural beauty and friendly hospitality one can only find in Montana.

Today, tourism offers something for just about every Montanan. It supports the history, culture and arts that make up our exceptional quality of life. It encourages preservation of our increasingly rare natural environment. And of course, it is a huge pillar of Montana's economy, bringing in more than \$3 billion in new revenue to Montana businesses every year.

Funding for tourism promotion comes from a 4% Lodging Facility Use Tax, commonly known as the "Bed Tax." Enacted by the 1987 legislature, the tax is collected from guests of hotels, motels, bed and breakfasts, guest ranches, resorts and campgrounds. These funds are divided among the entities shown in the pie chart to the right.

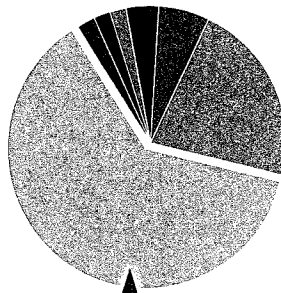
It should be noted that no additional money for tourism funding comes from Montana's General Fund. In fact, tourism helps support the General Fund due to the additional 3% Lodging Facility Sales Tax that was added in 2003 to the original 4%. This additional 3% accounted for more than \$12 million deposited directly into the General Fund in FY09 due to the success of Montana's tourism industry.

HOW THE 7% LODGING TAX IS DISTRIBUTED



HOW THE 4% LODGING FACILITY USE TAX IS DISTRIBUTED

(Including administrative appropriations)

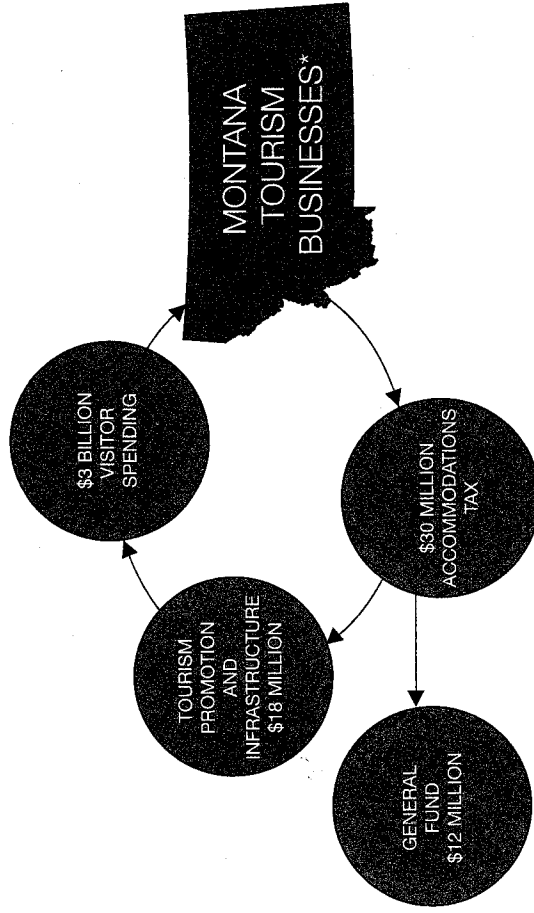


- 41% | 3% Lodging Facility Sales Tax deposited in General Fund
- 59% | 3% Lodging Facility Sales Tax deposited in General Fund | 4% Lodging Facility Use Tax
- 62% Department of Commerce/Montana Office of Tourism
- 22% Tourism Regions/CVBs
- 6% MT Fish, Wildlife & Parks
- 4% Historical Society
- 2% MT Heritage Preservation & Development Commission
- 2% Department of Revenue
- 2% University of MT/ITRR Research

TO STRENGTHEN

MONTANA'S ECONOMY

- Tourism and recreation businesses support 42,210 Montana jobs providing \$897 million in workers' salaries.
- Montana hosted 10 million visitors in 2008, which translates to 10 new customers per Montana resident, for our Main Street businesses.
- Nonresident visitors had a total economic impact of \$3.48 billion in 2008.
- Visitor spending generated over \$228 million in state and local tax revenue in 2008.
- Montana ranks 7th in the nation in per capita visitor spending.

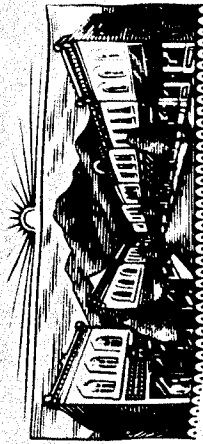


*2008 VISITOR SPENDING — \$3 BILLION IN NEW MONEY

Gasoline, Oil	\$841,900,000	28%	Outfitter, Guide	\$128,900,000	4%
Restaurant, Bar	\$640,000,000	21%	Licenses, Entrance Fees	\$61,100,000	2%
Retail Sales	\$473,300,000	16%	Transportation Fares	\$60,800,000	2%
Hotel, B&B, etc.	\$281,000,000	9%	Campground, RV Park	\$48,500,000	2%
Groceries, Snacks	\$253,900,000	8%	Misc. Services	\$43,800,000	1%
Auto Rental and Repairs	\$141,400,000	5%	Gambling	\$30,000,000	1%

(Source: Institute for Tourism and Recreation Research)

For more information regarding the economic impacts of tourism, visit www.itrrr.umt.edu.



HISTORIC
DOWNTOWN
BOZEMAN

WELCOME

TO PRESERVE

MONTANA'S QUALITY OF LIFE

- 3 out of 4 Montanans believe the benefits of tourism outweigh any negative impacts.
- A majority of Montanans believe that as tourism increases so does their quality of life.
- 7 out of 10 Montanans value our natural environment as a resource for tourism.
- 3 out of 4 Montanans believe Montana is a place everyone should see once in their lives.

(Source: *Institute for Tourism and Recreation Research*)

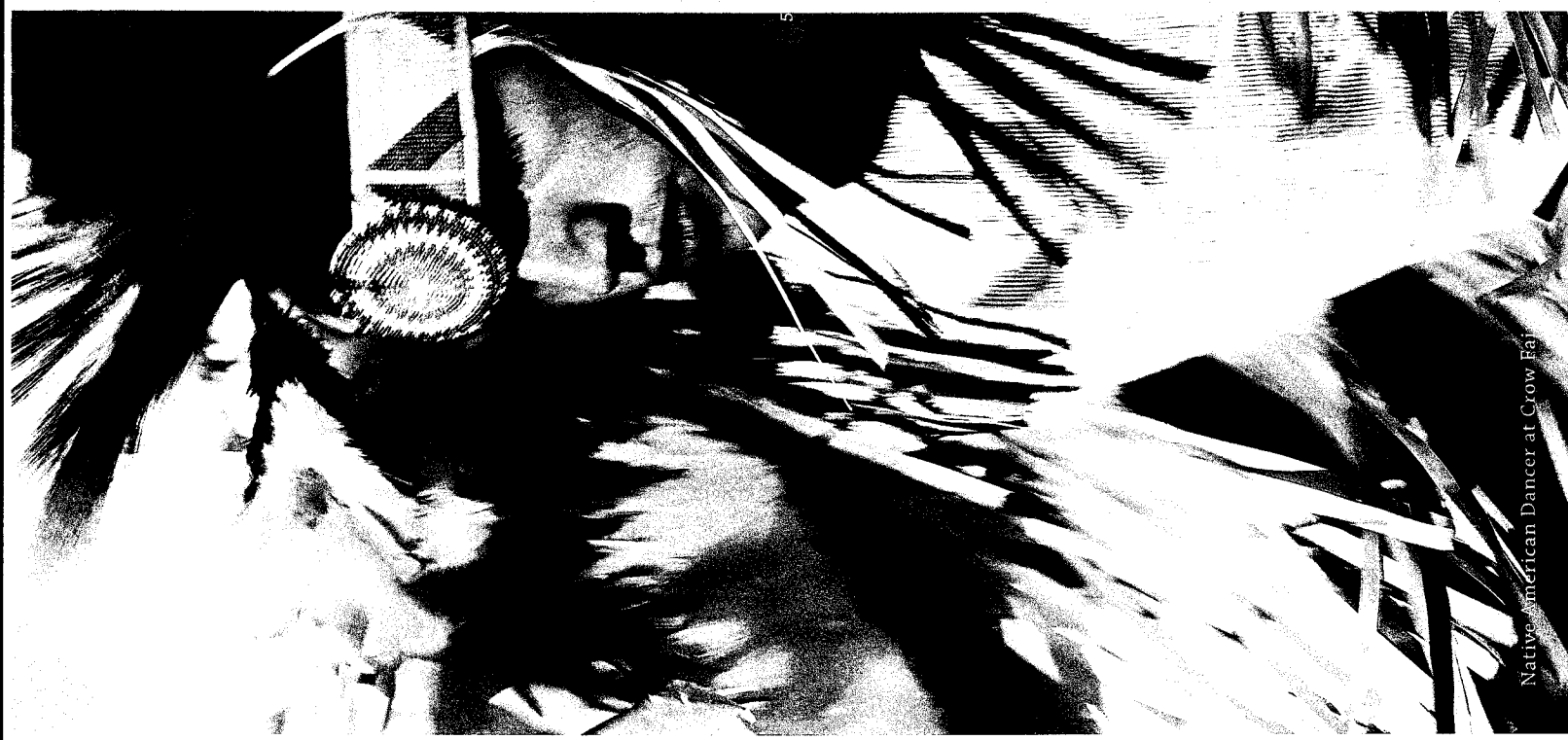
Such positive attitudes toward tourism can be partially attributed to the fact that tourism often supports community infrastructure and creates special events that are enjoyed by visitors and Montanans alike. Each year, hundreds of thousands of dollars of bed tax collections are allocated toward programs that help strengthen our communities. In 2009 these included:

TOURISM INFRASTRUCTURE INVESTMENT PROGRAM (TIIP) GRANTS RECIPIENTS:
 HAVRE Wanhpa Chu'gn Buffalo Jump | FORT BENTON Old Fort Benton | WOLF POINT Wolf Point Historical Museum | MISSOULA Historical Museum at Fort Missoula | DEER LODGE Powell County Museum & Art Foundation | BILLINGS Western Heritage Center

SPECIAL EVENTS GRANTS PROGRAM (SEGP) RECIPIENTS:

BILLINGS Northern Rockies Sustainable Living Expo | HELENA Western Rendezvous of Art | ANACONDA Art in Washoe Park | LIVINGSTON Summerfest | TROY Kootenai River Bluegrass Festival | STEVENSVILLE North West Honey Fest | POLSON Polson Main Street Flathead Cherry Festival | DRUMMOND Senior Pro Rodeo & Loggers Days | GLASGOW Bonnie City Blues & Brews Festival

GLACIER COUNTRY TIIP Grants (14 projects) \$534,752 SEGP Grants (17 events) \$135,110	RUSSELL COUNTRY TIIP Grants (20 projects) \$967,850 SEGP Grants (13 events) \$75,370	MISSOURI RIVER COUNTRY TIIP Grants (10 projects) \$521,503 SEGP Grants (8 events) \$39,940	Statewide Tourism "Bed Tax" Grants TIIP (1995-2009) — \$3.3 million SEGP (2003-2009) — \$492,500
GOLD WEST COUNTRY TIIP Grants (10 projects) \$473,877 SEGP Grants (12 events) \$110,855	YELLOWSTONE COUNTRY TIIP Grants (6 projects) \$372,356 SEGP Grants (9 events) \$89,425	CUSTER COUNTRY TIIP Grants (13 projects) \$473,257 SEGP Grants (9 events) \$61,300	The \$3.3 million in TIIP funds (1995-2009) helped create \$40 million in tourism facility improvements, a 12 to 1 match.



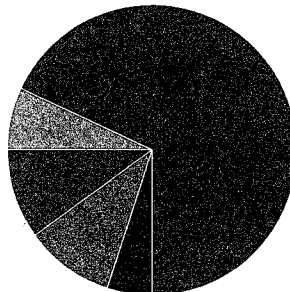
Native American Dancer at Crow Fair

LEADERSHIP

FROM THE OFFICE OF TOURISM

The Montana Office of Tourism (formerly Travel Montana) provides leadership for Montana's tourism and film promotion industries by marketing the entire state and helping to coordinate resources at the local level. All 50 states have tourism offices and though Montana's budget is 26% lower than the national average, our office is well respected for its efforts in branding the state, leveraging limited dollars and focusing on the emerging Geotourism segment.

FY09 ACTUAL
EXPENDITURES
\$12,512,822

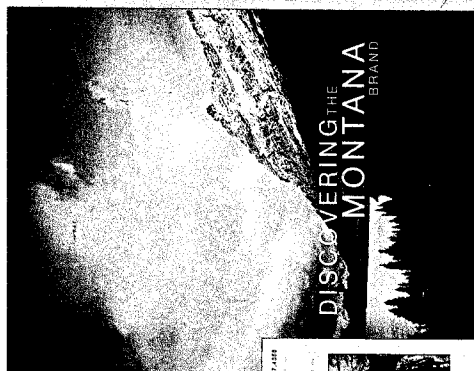


The Montana Office of Tourism's programs can be categorized into five main areas:

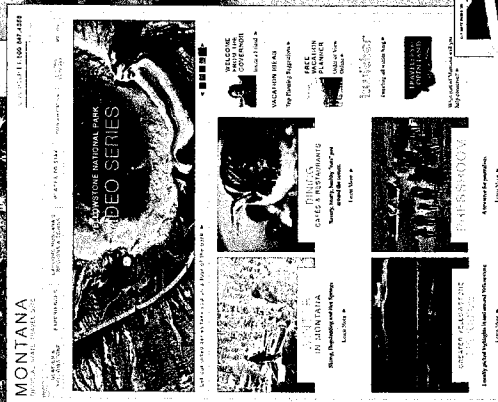
- **68% MARKETING TO CONSUMERS**
(Includes visitmt.com, public relations, advertising campaigns, social media, publications, visitor information centers and more)
- **7% MARKETING TO TRAVEL TRADE**
(Includes overseas missions, trade shows, online outreach, public relations and more)
- **10% OPERATIONS AND INDUSTRY SERVICES**
(Includes overhead, fulfillment, support for industry and more)
- **10% PRODUCT AND BRAND DEVELOPMENT AND EDUCATION**
(Includes grant programs to local communities, Superhost training, Governor's Conference on Tourism and Recreation, brand development, product development and more)
- **5% MONTANA FILM OFFICE**
(Includes filming incentives, location assistance, production guide, website with searchable location database, liaison assistance and more)



Vacation Planner



Brand Book



NATIONAL GEOGRAPHIC
ADVENTURE



bike



Publicity Articles

BUILT ON THE FOUNDATION OF THE MONTANA BRAND

While the Montana Office of Tourism is a central figure in our state's tourism industry, it is only one of hundreds of Montana tourism voices. By uniting the efforts of these various entities behind a clearly defined brand with a cohesive voice, the state would have stronger messaging and differentiation from its competitors.

Such was the challenge issued by Governor Schweitzer to the Tourism Advisory Council, who in turn directed the Montana Office of Tourism to undertake a process that would help better define the Montana brand.

This comprehensive process was completed in April 2009 and unveiled at the Governor's Conference on Tourism. Including extensive research and input of hundreds of Montanans, past visitors and potential visitors, this process resulted in a three-tier brand platform and communications strategy that will attract our target, the Geotraveler, to vacation in Montana.

The discovery process has ended, but working together will be an ongoing effort to cohesively communicate the Montana message to prospective visitors. Perhaps most importantly, the brand process helps ensure the vitality of Montana's economic success, our \$3 billion tourism industry and its assets, our people, towns and spectacular environment.

THE MONTANA BRAND IS:

1. More spectacular unspoiled nature than anywhere else in the lower 48.
2. Vibrant and charming small towns that serve as gateways to our natural wonders.
3. Breathtaking experiences by day, and relaxing hospitality at night.



SPECTACULAR UNSPOILED NATURE



VIBRANT & CHARMING
SMALL TOWNS



BREATHTAKING EXPERIENCES

INFLUENCING THE DECISION TO VISIT MONTANA

All programs within our office are designed to benefit Montana tourism as directly as possible with both the short- and long-term view in mind. The following is a typical purchase funnel that illustrates the journey many potential visitors have when they consider a vacation to Big Sky Country.

AWARENESS

The person is familiar with what Montana offers as a vacation destination.

- In cities where we advertised, top of mind awareness of Montana increased 5- to 10-fold.
- Placed more than \$3.5 million in media, producing over 185 million consumer impressions.
- Enhanced Montana's market reach through public/private partnerships by creating 15 cooperative advertising opportunities with MTOT investing \$496,818 and co-op partners contributing \$187,474.
- Montana's publicity efforts generated \$16.1 million in Montana tourism-related editorial exposure nationwide, a 28-to-1 return-on-investment.

INTEREST

The person has a more in-depth interest in vacationing to Montana.

- Of people who could recall Montana's advertising campaigns, the ads tripled their desire to visit.
- Visitmt.com generated over 6 million website visits in 2009, each visit averaging nearly 8 minutes on the site.
- To engage longer web user sessions, created a Glacier and Yellowstone National Parks video series along with A Day in the Life videos of unique Montanans as well as audio drive tours of distinctive Montana attractions.
- The number of Montana room nights (630,700) offered by tour companies in our six target European markets has increased 24% over FY08, more than any of the other four states involved in our regional cooperative program.
- More than 1.3 million promotional pieces are distributed annually.
- 2 out of 3 potential Montana visitors said after reviewing Montana travel information, they were more likely to visit within two years.

PURCHASE

The person takes action toward booking a Montana vacation.

- More than 1 out of 3 visitors lengthen their stay after receiving Montana travel information.
- 131,835 requests for additional travel information were fulfilled through e-mail, Internet, phone, reader service cards and web chat.
- Published 2,500 free tourism business listings in the 2009-2010 Vacation Planner.
- Visitmt.com provided 8,578 business listings and 3,676 hotlinks.



EXPERIENCES

The person makes the trip to Montana.

- \$0.75 of every visitor dollar is spent in our local communities.
- State-funded Visitor Information Centers (VIC) served over 181,000 travelers in 2009, a 15% increase over the previous year.
- Visitors assisted by Montana VIC staff lengthened their stay by 31%.
- In 2009 overseas visitors spent \$66 million in Montana.
- 2009 Montana Governor's Conference on Tourism & Recreation provided tourism training and education to 330 attendees.
- Provided Superhost customer service training in 36 Montana towns.
- Provided \$289,767 in tourism-related facility improvement grants to six Montana communities in 2009.

LOYALTY

The person has vacationed in Montana and, if he/she had a good experience, may tell others or make a return visit.

- Visitmontana on Twitter has added over 1,500 followers in seven months.
- The MTOT-administered Montana page on Facebook has over 30,000 fans.
- Montana has a strong attraction. 83% of visitors to Montana have been here before.
- Montana delivers on the experience. 85% of Montana's visitors plan to return within two years.
- Montana's vacationers have a 97% rate of overall satisfaction with the state.

THE IMPACT

10 million visitors
bring in
\$3 billion
to Montana
= \$1 spent on advertising
= \$50 spent in Montana
by nonresident visitors
= \$3.50 in local taxes
contributing
\$2.12 to the
General Fund

MARKETING STRATEGY THAT SERVES

ALL OF MONTANA

GEOTOURISM

Sustainable tourism that serves as a partnership between the traveler and those that live at a destination. Geotourism patronize locally owned businesses, buy from local craftspeople and eat regional cuisine. The money they spend helps local people earn a living while preserving the authenticity of the place. Overall, they believe in the stewardship of natural, cultural and historical resources upon which the quality of the destination depends.

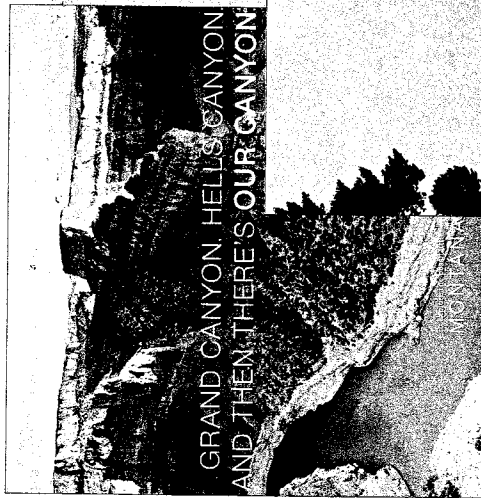
A sound marketing strategy recognizes and addresses certain key factors:

- Long-term vision to help guide efforts
 - Geotourism, a sustainable tourism approach that supports Montana's economy while positively contributing to Montanans' quality of life.
- Targeting the message to the most receptive audience
 - Brand resonates most with "Geotourists," roughly 55 million Americans—passionate travelers who are attracted to authentic places and a unique slice of life, and who appreciate the outdoors.
 - Increased emphasis in key markets with high propensity to travel to Montana, including Atlanta, Chicago, Seattle and Salt Lake City.
- Thorough understanding of consumers' wants and needs
 - Conducted in-depth research to better understand target audience travel mindset, behaviors and attitudes.
 - Monitored and evaluated trends that projected decreases in leisure travel spending, vacationing closer to home, consumers' hunt for value and growing interest in national parks.
- Knowledge of consumer purchasing behavior
 - FIRST-TIME VISITORS: 67% of first-time, non-resident visitors travel to Montana because of Yellowstone and Glacier National Parks.
 - REPEAT VISITORS: 86% of our visitors return to Montana and are attracted to less-traveled areas of the state.

- Battles the competition by playing to brand strengths
 - Promoted Glacier and Yellowstone National Parks as a way to reinforce the spectacular, unspoiled characteristics of Montana to first-time, nonresident visitors.
 - Promoted the natural icons of Montana's High Plains (eastern/central Montana) as a way to reinforce the spectacular, unspoiled characteristics of Montana to repeat visitors and residents, capitalizing on this group's familiarity with the state to encourage visitation to less-traveled locales.



National Print Advertising

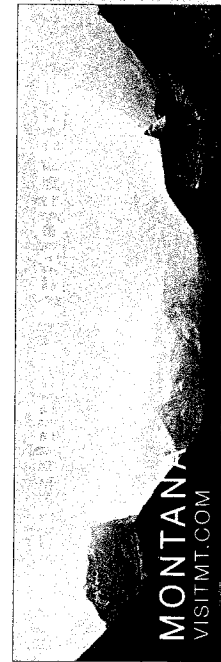


GRAND CANYON HELL'S CANYON
AND THEN THERE'S OUR CANYON



For more information, visit www.MontanaHighPlains.com

Print Advertising for Montana High Plains



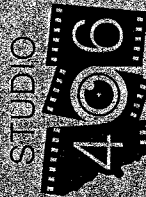
MONTANA
VISITMT.COM



EVENING COMMUTE

Billboard Advertising in Atlanta, GA

PUTTING THE BIG SKY ON THE BIG SCREEN



STUDIO
406
The incentive package at the
MONTANA FILM OFFICE

A special division of the Montana Office of Tourism is the Film Office. The Montana Film Office provides economic development to the state by promoting Montana as a motion picture and television production destination. Visit www.montanafilmm.com

SOME RECENT ACCOMPLISHMENTS INCLUDE:

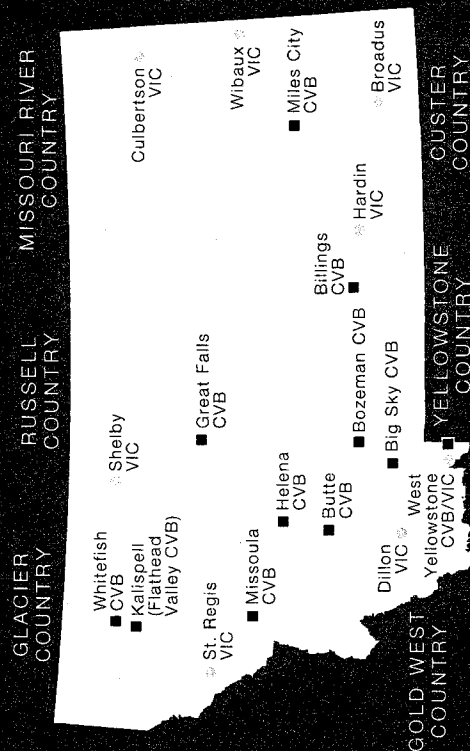
- Promoted and administered the Big Sky on the Big Screen Act, a film incentive program intended to keep Montana competitive among other states and nations. Successfully advocated the extension of the Big Screen Act until December 31, 2014.
- Certified 12 new productions for the Big Sky on the Big Screen Act.
- Assisted in bringing over 71 new film productions to Montana with an estimated direct economic impact of \$5 million and 130 FTE jobs.
- Launched new advertising campaign, Studio 406, to inform the film industry of Montana's multiple filming incentives and overall production value.
- Assisted in bringing a number of notable film productions to the state. The upcoming reality series *The Last American Cowboy*, an Animal Planet project, contributed approximately a half million dollars to rural Montana. A Montana-made feature film, *The Best Bar in America* was filmed in over 15 Montana locations. The Warner Brothers film *My Sister's Keeper*, filmed in Glacier, was released nationwide in June of 2009.
- Hosted the world premiere of *Call of the Wild* 3D, filmed in Montana in conjunction with Cinemark Theaters and Vivendi Entertainment.

HUNDREDS OF PARTNERS WORKING TOGETHER

The success of Montana's tourism industry is a result of hundreds, if not thousands, of entities working together to promote and enhance the Montana visitor experience. From Forest Service offices to rental car operators, motels to ski areas, there are simply too many entities to mention and thank here. Lodging tax-funded regional tourism countries, Convention and Visitors Bureaus (CVB) and Visitor Information Centers (VIC) are noted on the map. For information on the many other partners included in the Montana tourism industry's five-year Strategic Plan, visit www.travelmontana.mt.gov/marketingplan.

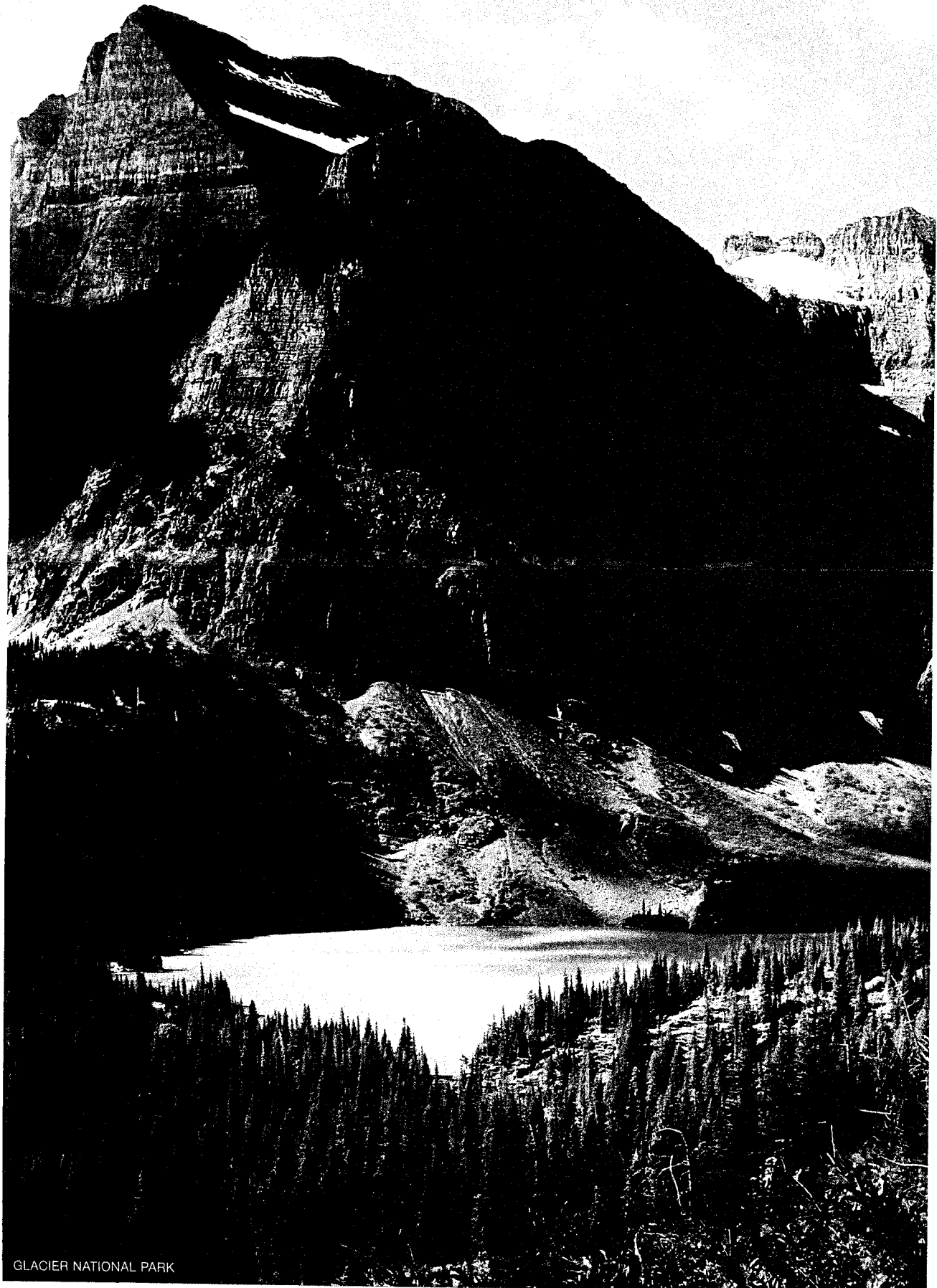
OUR MISSION is to strengthen Montana's economy through the promotion of the state as a vacation destination and film location. By maximizing the combined talents and abilities of its staff, and with guidance from the Governor's Tourism Advisory Council, the Montana Office of Tourism strives to promote a quality experience to visitors while encouraging preservation of Montana's environment and quality of life.

- Montana Office of Tourism, Department of Commerce



□ CVB Location (Convention and Visitors Bureau)
● VIC Location (Visitor Information Center)

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GLACIER NATIONAL PARK

MONTANA IS

MORE SPECTACULAR
UNSPOILED NATURE
THAN ANYWHERE ELSE IN THE LOWER 48.

VIBRANT & CHARMING
SMALL TOWNS THAT SERVE
AS GATEWAYS TO NATURAL WONDERS.

BREATHTAKING
EXPERIENCES BY DAY
AND RELAXING HOSPITALITY AT NIGHT.



THANK YOU for taking on the challenge to brand Montana. The spectacular landscapes and vibrant towns that we all love are assets that are important to Montana's tourism industry. I hope you'll continue your work to unify tourism marketing efforts that are important to not only your success in the tourism industry, but the success of the entire Montana economy.

GOVERNOR BRIAN SCHWEITZER

To learn more about the Montana brand and how it can be implemented throughout your marketing efforts, contact the Montana Office of Tourism at 1.406.841.2870 or visit travelmontana.mt.gov/branding.

MONTANA Department of Commerce, Anthony J. Preite, Director



2011 Session

Exhibit 5

These exhibits are 4 full colored highway maps and brochure which cannot all be scanned due to size and color. A photocopy has been scanned to aid you in your research.

The original exhibit is on file at the Montana Historical Society and may be viewed there.

**Montana Historical
Society Archives
225 N. Roberts
Helena MT 59620-1201
2011 Legislative Scanner Susie Hamilton**

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THE MONTANA DINOSAUR TRAIL

150 MILLION YEARS IN THE MAKING.

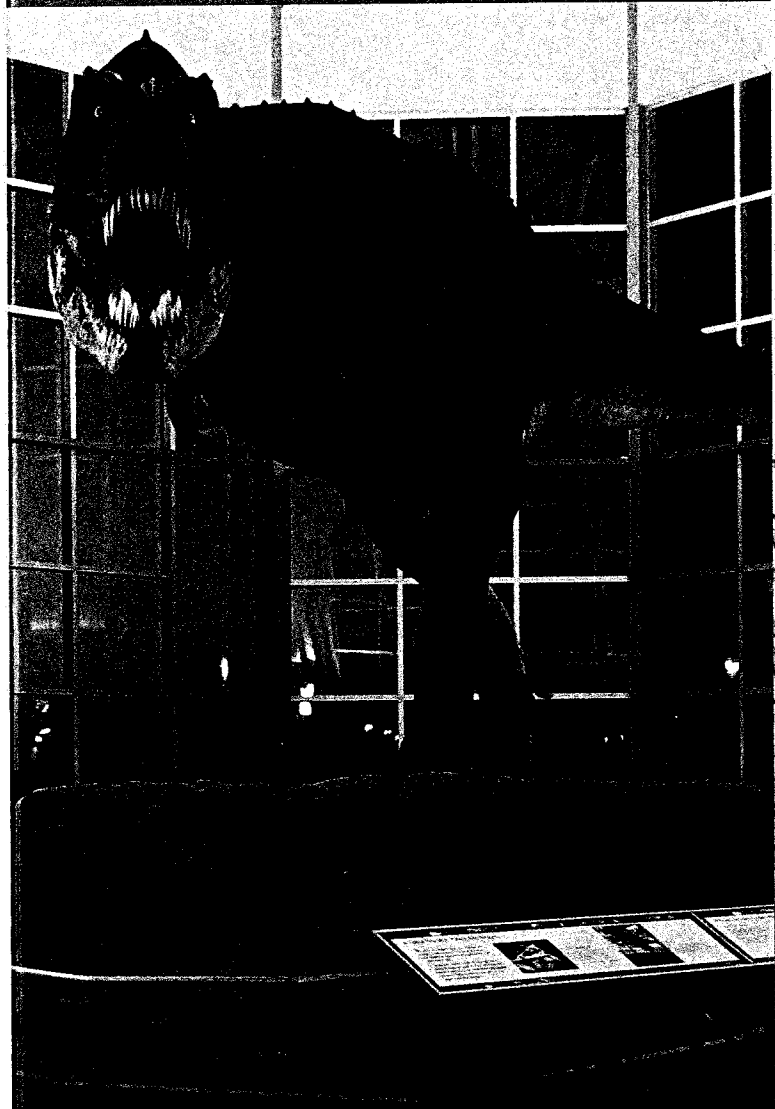


EXHIBIT NO. 5
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MONTANA

Highway Map



for free distribution

EXHIBIT NO.

5

DATE

1.24.11

BILL NO.

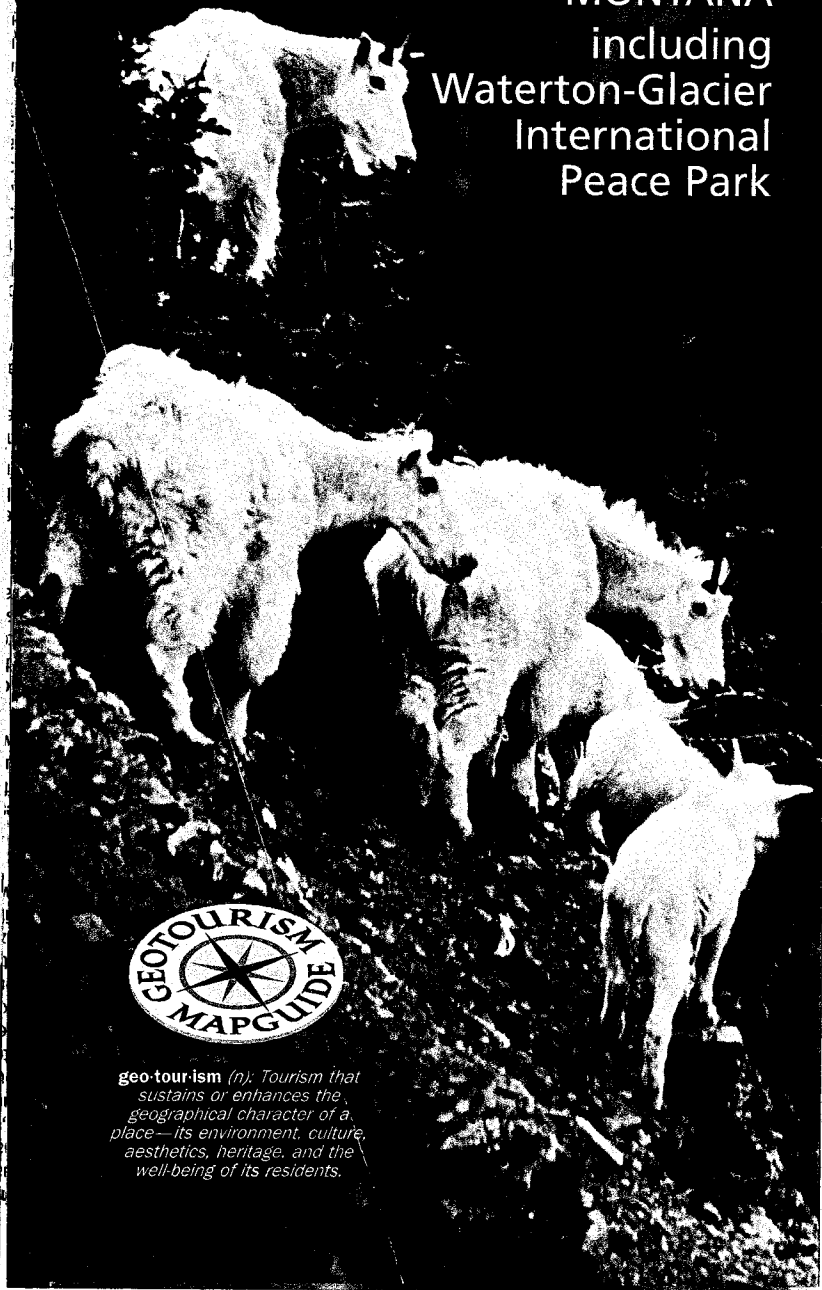
Commerce



NATIONAL
GEOGRAPHIC

Crown of the Continent

ALBERTA
BRITISH COLUMBIA
MONTANA
including
Waterton-Glacier
International
Peace Park



geo-tourism (n): Tourism that
sustains or enhances the
geographical character of a
place—its environment, culture,
aesthetics, heritage, and the
well-being of its residents.

EXHIBIT NO.

5

DATE

1.24.11

BILL NO.

Commerce

Greater Yellowstone Region

IDAHO, MONTANA, and
WYOMING

including Yellowstone
and Grand Teton
National Parks



geotourism (n): Tourism
that sustains or enhances the
geographical character of a
place—its environment, culture,
aesthetics, heritage, and the
well-being of its residents.